

Rising to the Communications Challenge

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July 7, 2020



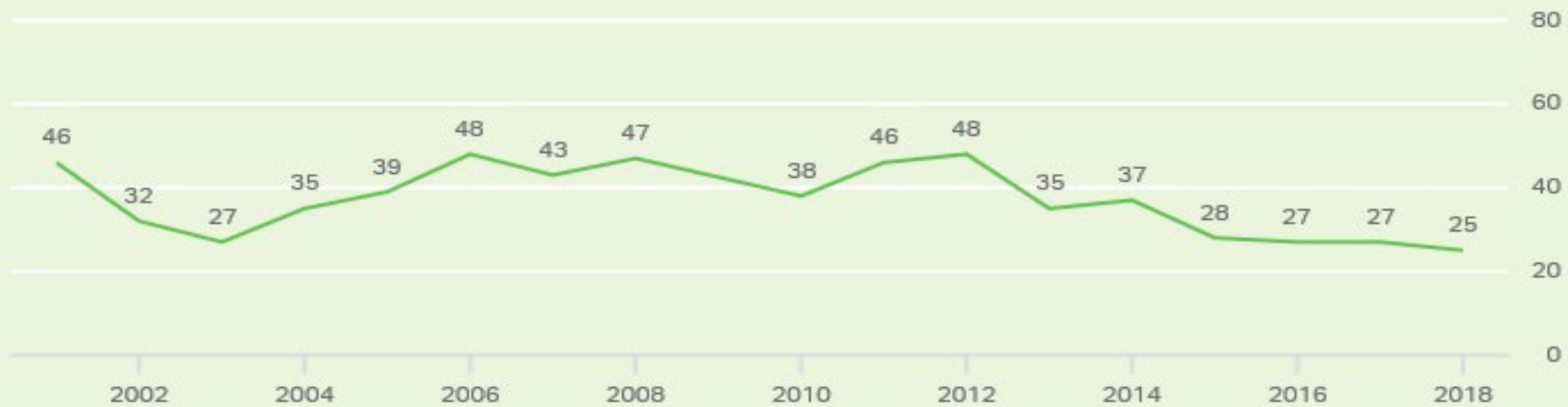
- Where we find ourselves
- Challenge of the Climate Challenge
- Studying our approach
- How must oil & gas communicate the essential value it delivers?

Energy affordability concerns decrease with energy cost

Concern About the Availability and Affordability of Energy Lowest to Date

Next, I'm going to read a list of problems facing the country. For each one, please tell me if you personally worry about this problem a great deal, a fair amount, only a little or not at all. How much do you personally worry about the availability and affordability of energy?

■ % Worry a great deal

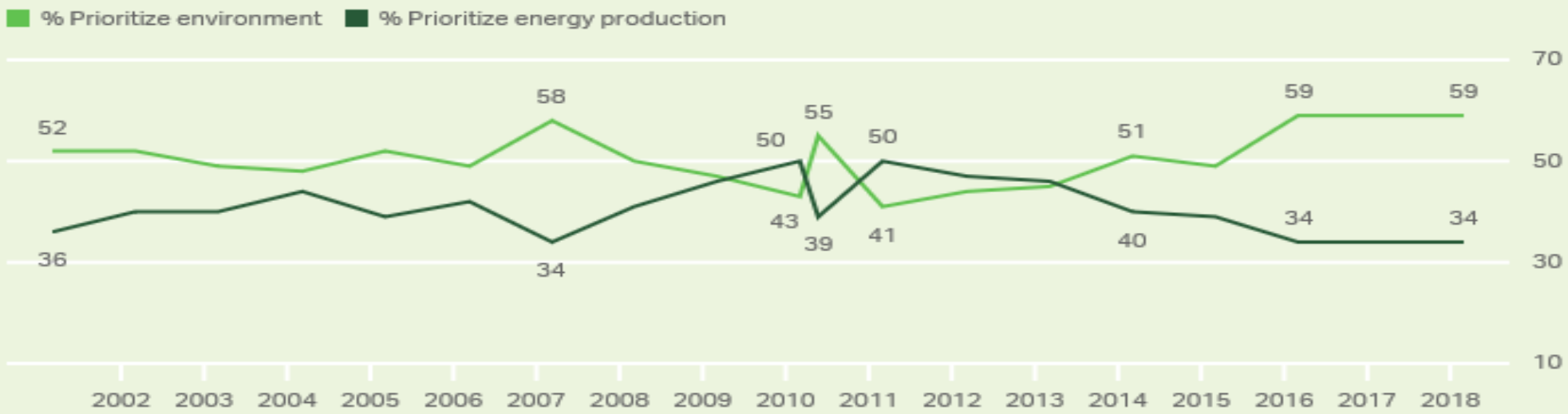


GALLUP

Perceptions put energy and environment against each other

Americans Prioritize Environmental Protection Over Energy Production

With which one of these statements about the environment and energy production do you most agree -- protection of the environment should be given priority, even at the risk of limiting the amount of energy supplies -- such as oil, gas and coal -- which the United States produces (or) development of U.S. energy supplies -- such as oil, gas and coal -- should be given priority, even if the environment suffers to some extent?



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Perceptions of the industry are not tied to what it can control

Ratings of Oil and Gas Industry Versus Average Price of a Gallon of Gasoline



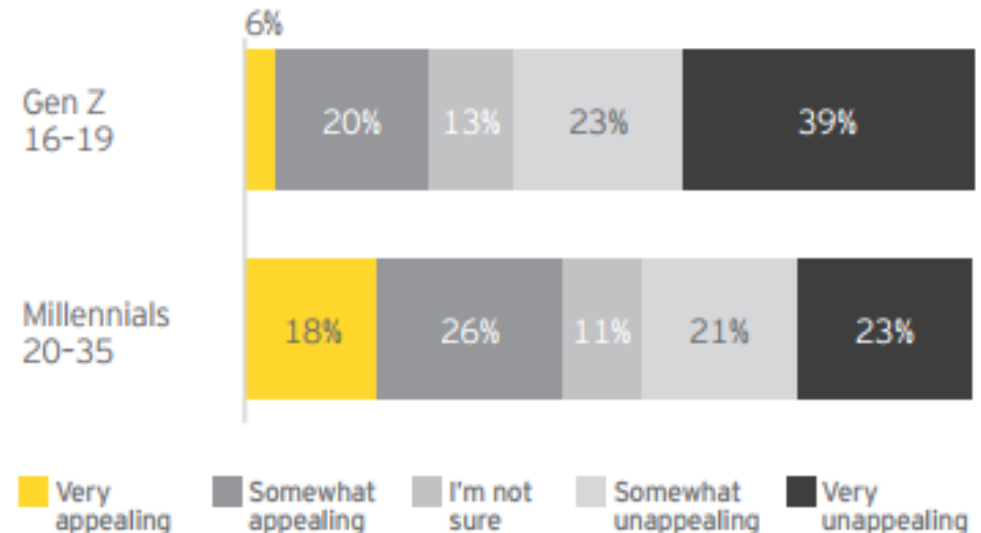
Note: Gas prices are the average price of gas in the U.S. in August of each year.

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The industry is not seen as appealing for younger generations

Appeal of a career in oil and gas

Q How appealing to you is a career in the oil and gas industry?



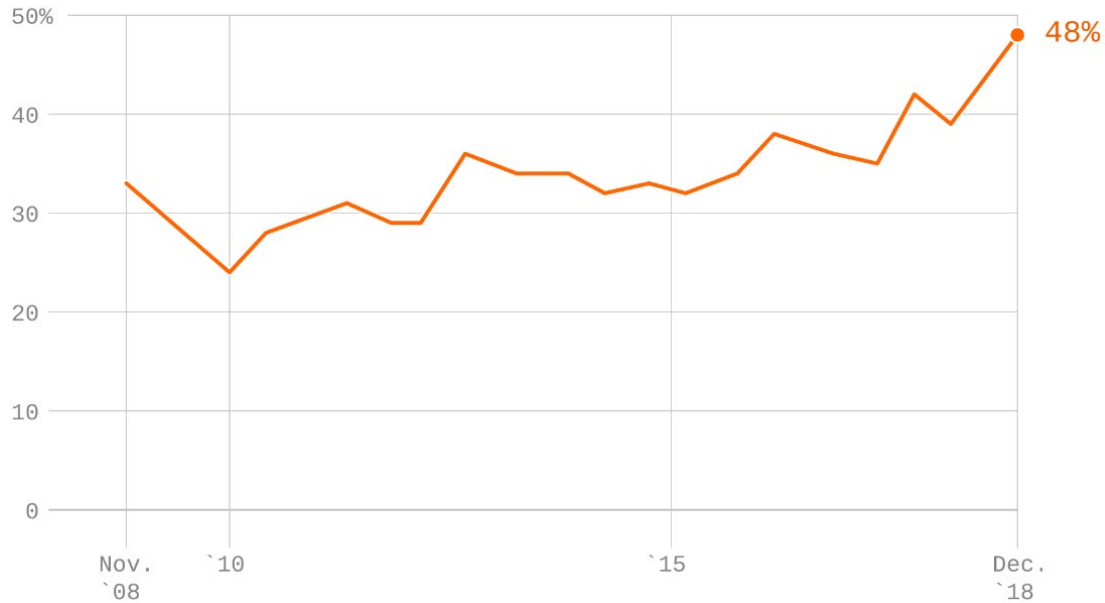
By a narrow margin (+3%), executives believe oil and gas careers are appealing to young people. By a wider margin (-11%), the young people surveyed said those jobs are unappealing.

Source: [EY 2017](#) – How do we regenerate this generation's view of oil and gas?

Fear & Hope

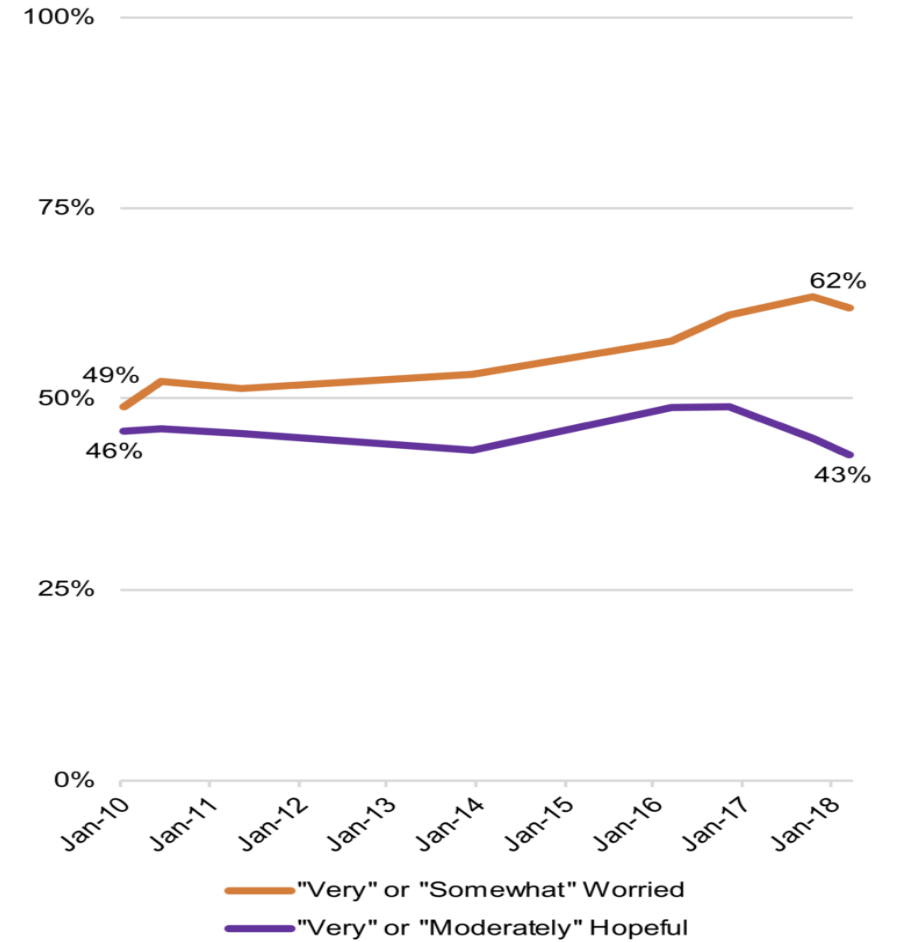
Share of Americans who think global warming is harming them "right now"

Nov. 2008 to Dec. 2018



Data: [Yale Program on Climate Change Communication](#); Chart: Chris Canipe/Axios


Fig. 1 Growing Gap between Hope and Worry about Global Warming



How worried are you about global warming?
 How strongly do you feel each of the following emotions [Hopeful] when you think about the issue of global warming?
 Eight surveys: January 2010 – March 2018

Source: Yale Program on Climate Change Communication

Bias to Action

 **Climate Change**

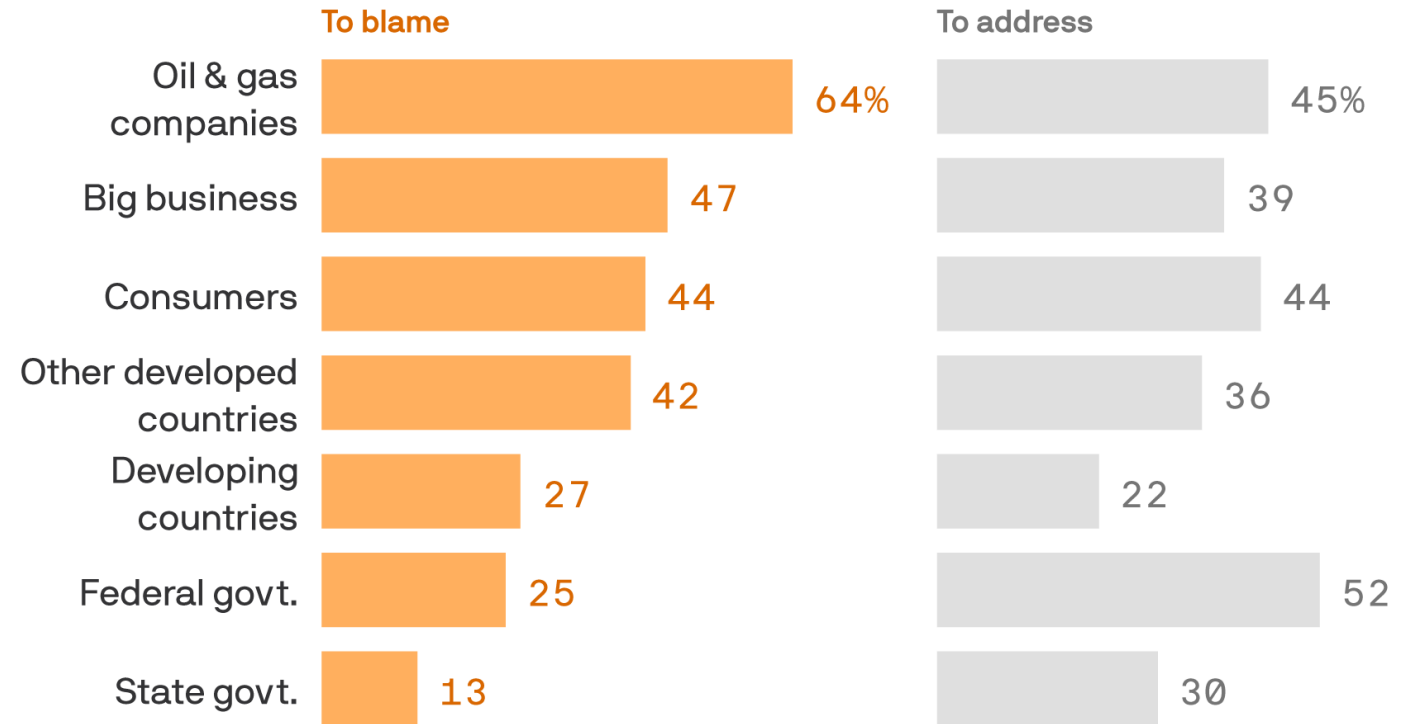
	July 1999	June 2006	Jan 2007	Oct 2009	Dec 2009	June 2014	April 2017
Immediate Action	23%	29%	34%	29%	23%	31%	39%
Some Action	28%	30%	30%	27%	31%	30%	28%
TOTAL TAKE ACTION	51%	59%	64%	56%	54%	61%	67%
NET DIFFERENCE	+8%	+22%	+31%	+14%	+13%	+24%	+35%
TOTAL NO ACTION	43%	37%	33%	42%	41%	37%	32%
Don't Know Enough	32%	28%	25%	29%	29%	24%	22%
Concern Unwarranted	11%	9%	8%	13%	12%	13%	10%

9

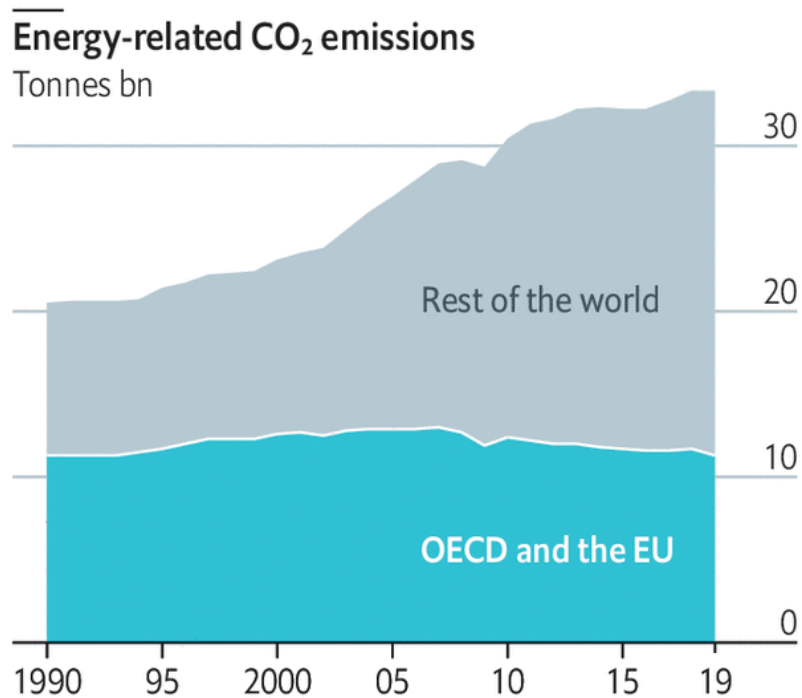
Bias to Blame

Assigning blame for climate change and burden to address it

Survey of 1,000 registered U.S. voters conducted Dec. 3–13, 2019.
 Respondents could select 3 choices per question.

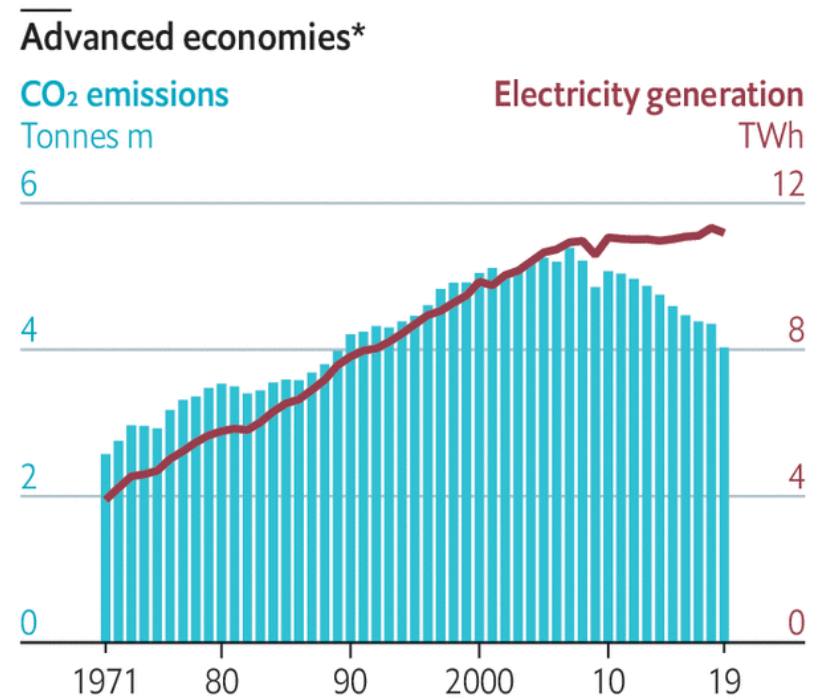


Who has made progress?



Source: IEA

The Economist

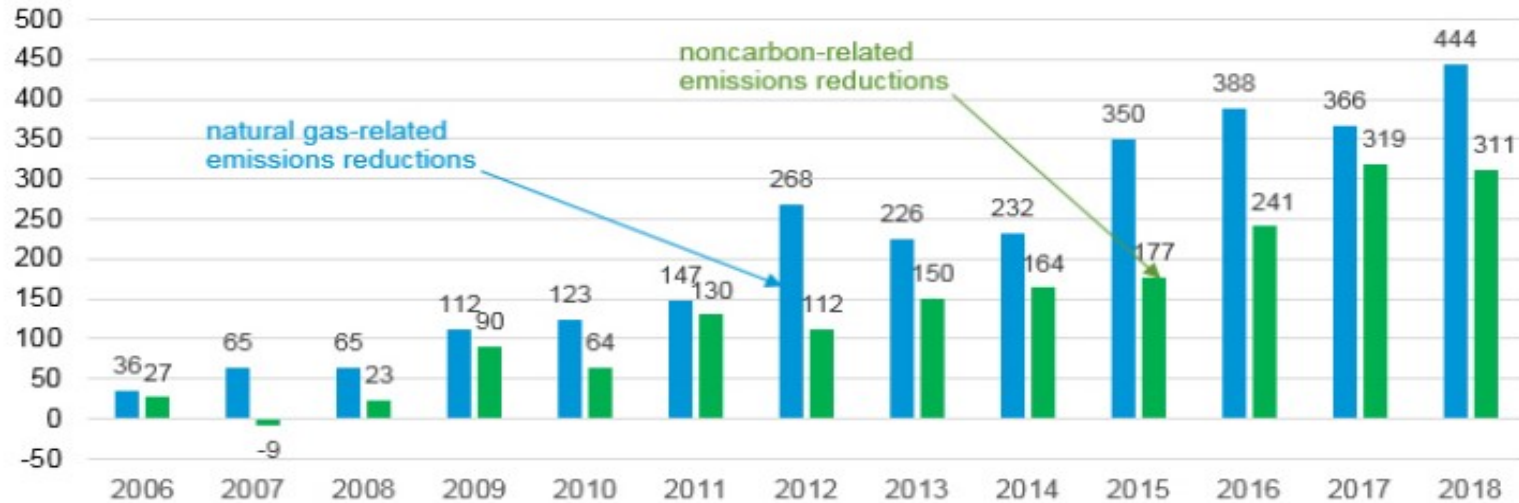


*Australia, Canada, Chile, European Union, Iceland, Israel, Japan, South Korea, Mexico, Norway, New Zealand, Switzerland, Turkey and United States

Who has made progress?

Figure 9. Electricity generation CO2 savings from changes in the fuel mix since 2005

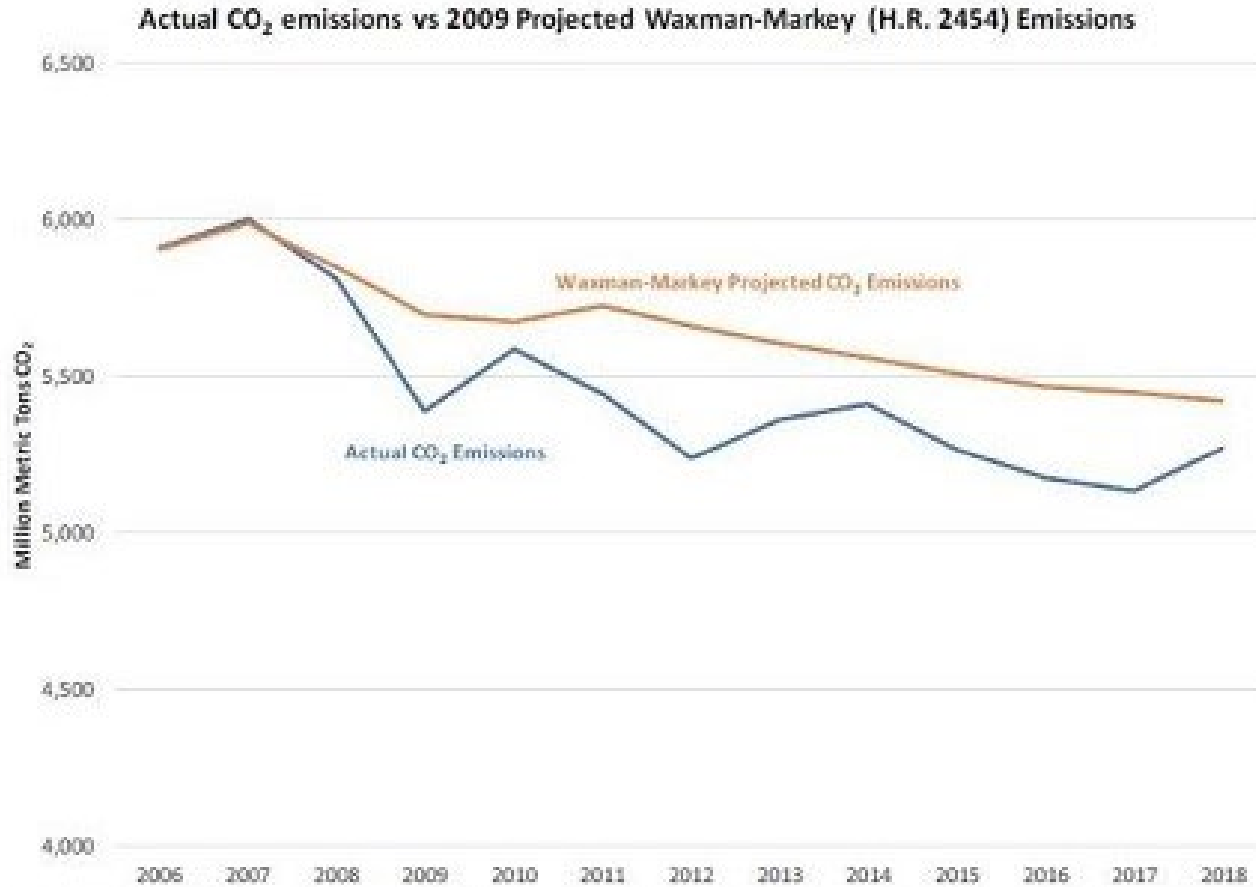
million metric tons of carbon dioxide



Sources: U.S. Energy Information Administration, Monthly Energy Review, October 2019, Table 11.6, Carbon Dioxide Emissions From Energy Consumption: Electric Power Sector and calculations made for this analysis based on Table 7.3c, Consumption of Selected Combustible Fuels for Electricity Generation: Commercial and Industrial Sectors (Subset of Table 7.3a). Distributed solar generation from Table 10.6, Solar Electricity Net Generation is added to generation values from Table 7.2a, Electricity Net Generation: Total (All Sectors). See Table 2 on page 16 for carbon dioxide values for the commercial and industrial sectors.

Note: This analysis includes estimated CO2 emissions from electricity generated in all sectors. Non-carbon electricity generation includes small-scale solar. CO2 refers to carbon dioxide.

Where would we be if....

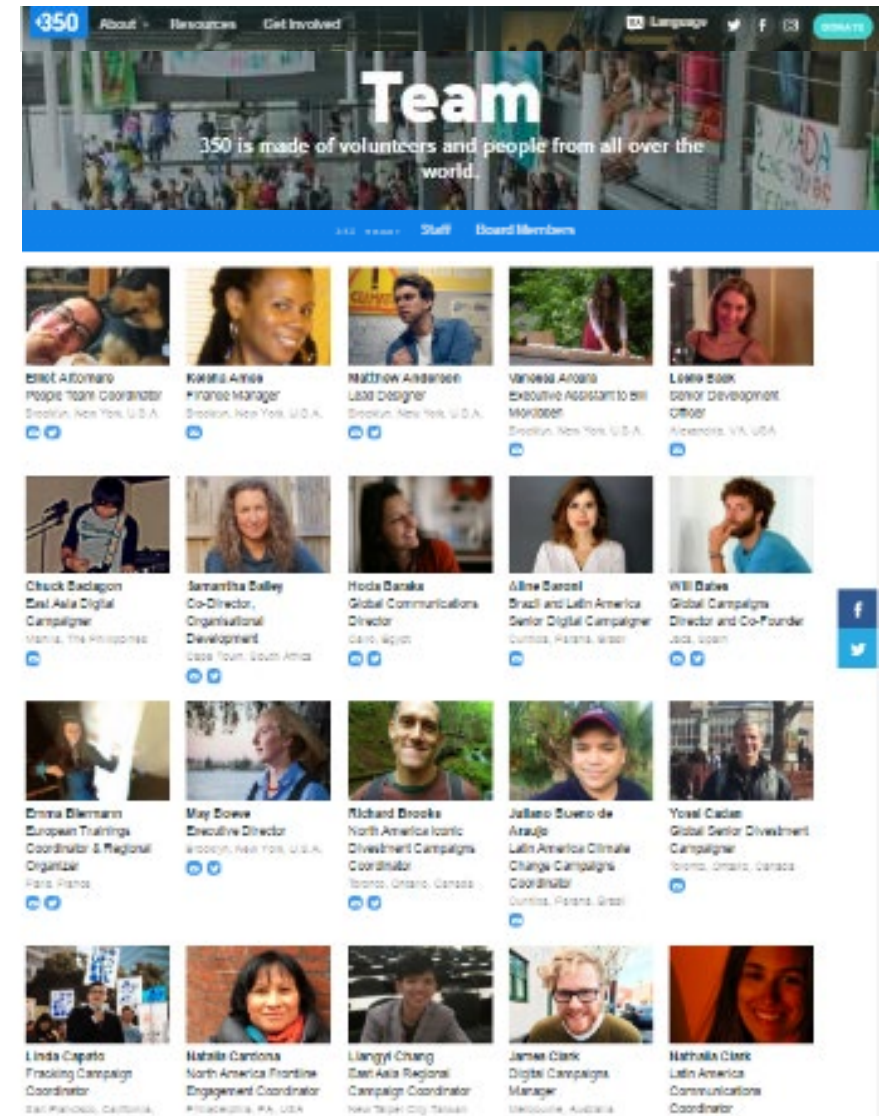


Source: EIA, Monthly Energy Review, May 20, 2009; EIA, Energy Market and Economic Impacts of H.R. 2454, the American Clean Energy and Security Act of 2009, August 4, 2009.

The
measure
of **success:**
Policy vs. Public
Support



Public communications is a priority



Many in the **public don't like the industry.**
We need to **earn** their support.

LOOK BEYOND 

Ask Yourself

What helps make your life better?



POWER PAST IMPOSSIBLE

NATURAL GAS CONDENSES TIME
Time travel and communication is made and production, we are successful paying back and cleaner than ever thanks to natural gas and oil.

NATURAL GAS FUELS ADRENALINE
From the way in the mountains, natural gas can do more than mountains and the toughest that need to explore and conquer nature.

NATURAL GAS SPARKS INVENTION
The natural gas and oil industry is spearheading innovation steps to take the world power past the impossible every day.

OIL EXPLORES SPACE
The adventure proved to get closer to the stars is fueled by the natural gas and oil industry.

The opposition
is **relevant**
and **relatable**



For every **COMPLEX PROBLEM**
there is an answer that is
CLEAR, SIMPLE and **WRONG**

- H. L. Mencken

Who we are

Where we are

What we stand for

How we see the **future**

Great Campaigns (plus [Life: Powered](#))

Energy for Progress

[Www.energyforprogress.org](http://www.energyforprogress.org)

Imagine That

https://imaginethat.org/?utm_referrer=https%3A%2F%2Fwww.google.com%2F

Cooking With Gas

<https://cookingwithgas.org/>

Your Energy

<https://yourenergyamerica.com/>

Look Beyond

<http://www.lookbeyond.org/> @lookbeyond_org

New Mexico Oil & Gas Assoc.

https://www.nmoga.org/benefits_of_oil_natural_gas / @saferstrongernm

Oklahoma Energy Resources

<https://www.oerb.com/about/advertising/television>

Energy of North Dakota

<https://energyofnorthdakota.com/> @EnergyofND

Texas Oil & Gas Association

<https://www.txoga.org> / @TXOGA

Texans for Natural Gas

@TXforNatGas