

2019 Global Energy Pulse



Asia

ANALYSIS

Overall findings for the Asia region in this study include research results from respondents living in China, Japan, India and South Korea.

In an effort to set the operating context for perceptions of the industry reputation, respondents were asked to rate their level of favourability towards seven key sectors: Automotive companies, Banking companies, Oil companies, Mining companies, Electricity utility companies, Natural gas companies, and Water utility companies.

Overall, respondents in the Asia region have somewhat more favourable perceptions towards the collective industries tested than the rest of the global respondents. Results are notably higher than the global favourability measures for natural gas companies (8 points higher than the global measure), electricity utilities (8 points higher) and oil companies (7 points higher). Within the Asia region, respondents from India and China have considerably more favourable impressions of all sectors including oil and natural gas companies while those from South Korea are most critical.

On the question of trust, respondents were asked to focus on two industries specifically; oil and natural gas. Respondents in the Asia region express higher trust ratings compared to the global measures – 14 percentage points higher for both oil and natural gas companies. Results are consistent with the 2017 study. Notably, within the Asia region trust in China is 30 percentage points higher for oil and 36 points higher for natural gas companies than global measures and roughly 20 percentage points higher in India for both sectors. Results are on par with global measures in Japan and South Korea.

On the question of industry regulation, most respondents globally and a majority of respondents in the Asia region feel that there is currently the right amount of regulation governing each industry. Respondents in the Asia region are more likely to feel there is the right amount of regulation for all industries than the global measure. The biggest gaps are for the oil industry (19 percentage points higher), mining industry (18 points higher) and the natural gas industry (15 points higher). Compared to 2017, respondents from the Asia region are more likely to feel there is too much regulation for automotive companies (6 points higher).

As part of the exploring perceptions about the energy sector globally, respondents were asked to compare each industry across 13 key factors of influence. A key difference between the 2017 and the 2019 studies was that oil and gas were separated and measured individually as “oil” and “natural gas.”

Respondents in the Asia region have more favourable views about the oil and natural gas industries compared to the global measurements. For the oil industry, the gap between respondents in Africa and the global measure are widest for the following attributes: is an industry that I trust (8 points higher), has a strong track record of behaving responsibly (7 points higher), makes sure high safety standards are met in all places (7 points higher), has a positive impact on the economy (8 points higher). For the natural gas industry, gaps between the Asia region and the global measure are widest gaps for: cares about the planet and our environment (11 points higher), is an industry that I trust (9 points higher), has a positive impact on the economy (9 points higher), and makes sure high safety standards are met in all places (7 points higher). Compared to 2017, impressions of oil companies have improved for makes sure high safety standards are met (4 points higher). Within the Asia region, favourability for both oil and natural gas is much higher than global measurements in India and China and lower in Japan and South Korea.



1. Industry Reputation and Regulation

FAVOURABILITY BY INDUSTRY

INDUSTRY	FAVOURABLE				NEUTRAL				UNFAVOURABLE			
	ASIA		GLOBAL		ASIA		GLOBAL		ASIA		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
BANKING COMPANIES	54%	53%	48%	50%	36%	36%	32%	32%	11%	10%	20%	18%
AUTOMOTIVE COMPANIES	55%	56%	52%	52%	38%	38%	39%	38%	7%	6%	9%	10%
OIL COMPANIES	48%	46%	40%	38%	43%	45%	40%	38%	9%	10%	21%	24%
WATER UTILITY COMPANIES	54%	54%	50%	52%	40%	40%	37%	35%	7%	5%	13%	12%
NATURAL GAS COMPANIES	53%	54%	45%	47%	41%	41%	42%	40%	6%	5%	13%	14%
ELECTRICITY UTILITY COMPANIES	52%	57%	47%	49%	37%	35%	34%	32%	11%	8%	19%	18%
MINING COMPANIES	32%	32%	28%	31%	55%	55%	52%	47%	13%	13%	20%	21%

REGULATION BY INDUSTRY

INDUSTRY	TOO MUCH				ABOUT RIGHT				TOO LITTLE			
	ASIA		GLOBAL		ASIA		GLOBAL		ASIA		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
BANKING COMPANIES	20%	24%	21%	19%	56%	57%	47%	49%	24%	19%	32%	32%
AUTOMOTIVE COMPANIES	14%	20%	17%	18%	65%	61%	60%	57%	21%	19%	23%	25%
OIL COMPANIES	14%	17%	17%	17%	65%	63%	49%	44%	21%	21%	33%	39%
WATER UTILITY COMPANIES	12%	13%	14%	15%	69%	69%	59%	58%	20%	18%	27%	28%
NATURAL GAS COMPANIES	13%	16%	16%	16%	71%	69%	57%	54%	16%	15%	27%	30%
ELECTRICITY UTILITY COMPANIES	15%	17%	17%	18%	63%	62%	53%	50%	22%	20%	31%	32%
MINING COMPANIES	11%	14%	13%	14%	63%	64%	51%	46%	26%	21%	36%	39%

It is important for industry to understand how much credibility and trust citizens have in the various voices regularly discussing issues related to the oil and natural gas sector.

The top-rated sources among respondents in the Asia region are the same as those who are valued globally—university professors with expertise in natural gas or oil issues and scientists working for either industry. However, respondents in the Asia region have weaker impressions of university professors who are an expert on oil (8 points lower than globally) or natural gas (7 points lower). Notably, they are more likely to feel that an industry association representing oil companies (6 points higher) or natural gas companies (7 points higher) are credible as well as government officials or the leader of their country (7 points higher for both).

Globally and in the Asia region, nearly one half or more respondents have favourable views towards all prominent energy sources tested. Renewables (solar and wind) and hydroelectric continue to be viewed most positively with more than ninety percent favourability both globally and in the Asia region. In the Asia region, nine in ten (90%) respondents say that they have a favourable view about natural gas as an energy source (8 percentage points higher than globally), and two-thirds (66%) share the same perspective about oil (9 points higher).

Compared to 2017, impressions have improved for nuclear power (4 points higher) and worsen for burning waste (8 points lower) and coal (5 points lower).

Consistent with the 2017 study, more than half (56%) of respondents in the Asia region agree that their lives are better today because of what oil has made possible (11 percentage points higher than the global measure). On the topic of environmental impacts, four in ten (44%) respondents agree that it is possible for oil development to balance economic benefits and environmental impacts (4 points higher). Similar to the global perspective, few respondents (31%) in the Asia region agree that it is feasible and practical that in ten years they will use almost no oil and natural gas in their day to day lives. Globally, respondents are divided when it comes to the industry being sincerely committed and working hard to reduce the amount of greenhouse gases it produces (three in ten agree and a similar proportion disagree). In Asia, however, respondents are less divided and more likely to agree (11 percentage points higher than the global measure).

2. Industry Attributes

GLOBAL PERSPECTIVES ON KEY INDUSTRY ATTRIBUTES

INDUSTRY	OIL				MINING				NATURAL GAS			
	ASIA		GLOBAL		ASIA		GLOBAL		ASIA		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
HAS A STRONG TRACK RECORD OF FINANCIAL PERFORMANCE	37%	40%	38%	40%	26%	28%	26%	29%	36%	37%	34%	35%
HAS A POSITIVE IMPACT ON THE ECONOMY IN...	44%	47%	39%	40%	35%	36%	30%	32%	45%	47%	39%	38%
PROVIDES HIGH QUALITY PRODUCTS OR SERVICES	37%	36%	32%	33%	25%	27%	24%	27%	38%	39%	34%	35%
IS WELL MANAGED	38%	38%	31%	32%	25%	25%	22%	24%	37%	39%	31%	33%
IS INNOVATIVE	32%	30%	30%	31%	24%	23%	21%	23%	36%	35%	32%	32%
CONTRIBUTES TO SOCIOECONOMIC DEVELOPMENT IN COMMUNITIES WHERE IT OPERATES	38%	40%	32%	34%	29%	33%	26%	28%	38%	41%	32%	35%
MAKES SURE HIGH SAFETY STANDARDS ARE MET IN ALL PLACES	36%	39%	31%	31%	25%	27%	23%	25%	38%	42%	34%	35%
IS AN INDUSTRY THAT I TRUST	39%	37%	29%	29%	26%	25%	21%	24%	40%	43%	32%	34%
IS RESPONSIVE TO THE NEEDS OF CUSTOMERS	34%	35%	28%	29%	25%	26%	20%	22%	34%	37%	30%	32%
HAS A STRONG TRACK RECORD OF BEHAVING RESPONSIBLY*	35%	35%	27%	28%	25%	26%	20%	23%	35%	37%	29%	31%
WORKS ETHICALLY WITH POLITICIANS AND GOVERNMENT OFFICIALS	26%	24%	21%	21%	20%	20%	17%	18%	27%	26%	23%	23%
CARES ABOUT THE PLANET AND OUR ENVIRONMENT	31%	28%	22%	22%	23%	22%	18%	19%	40%	41%	29%	30%
CHARGES A FAIR PRICE FOR THEIR PRODUCTS/SERVICES	31%	29%	24%	24%	24%	25%	20%	22%	33%	34%	27%	29%

*statement changed from 'Has a strong track record of corporate social responsibility' in 2017 to 'Has a strong track record of behaving responsibly' in 2019.



A key objective of this research initiative was to understand whether there was global interest in Canadian oil, as well as assessing measurements for the industry's messaging about safety and environmental innovation.

Respondents were asked if they would like to see more, less or the same amount of oil and natural gas from a series of top producing countries (excluding their country of residence). Opinions remain consistent with 2017. Globally, Canada ranks as the top country for receiving more oil or natural gas, while it ranks fourth out of eleven countries for natural gas in the Asia region and seventh for oil. Notably, respondents in the Asia region are more likely to prefer to receive more oil and natural gas from several countries than the global measure including: Saudi Arabia, Iran, UAE, Kuwait, Russia, and Iraq.

Despite the comparatively lower ranking for Canada, more respondents in the Asia region agree with statements about Canada's safety (7 points higher) and environmental record (5 points higher) compared to global measures.

OIL AND NATURAL GAS

POSITIVE IMPACT ON THE ECONOMY

WELL ABOVE/SLIGHTLY ABOVE AVERAGE

	OIL		NATURAL GAS	
	2017	2019	2017	2019
TOTAL ASIA	44%	47%	45%	47%
SOUTH KOREA	32%	33%	37%	37%
CHINA	55%	69%	56%	64%
JAPAN	24%	28%	22%	26%
INDIA	63%	60%	64%	61%

HAS A STRONG TRACK RECORD OF FINANCIAL PERFORMANCE

WELL ABOVE/SLIGHTLY ABOVE AVERAGE

	OIL		NATURAL GAS	
	2017	2019	2017	2019
TOTAL ASIA	37%	40%	36%	37%
SOUTH KOREA	23%	26%	25%	19%
CHINA	46%	53%	46%	54%
JAPAN	20%	25%	14%	20%
INDIA	60%	57%	58%	55%

PROVIDES A HIGH QUALITY PRODUCT OR SERVICE

WELL ABOVE/SLIGHTLY ABOVE AVERAGE

	OIL		NATURAL GAS	
	2017	2019	2017	2019
TOTAL ASIA	37%	36%	38%	39%
SOUTH KOREA	25%	21%	28%	24%
CHINA	46%	48%	49%	56%
JAPAN	19%	22%	16%	22%
INDIA	59%	53%	58%	55%



3. Trust

TRUSTED SOURCES OF INFORMATION - BELIEVE MOST/SOME OF WHAT THEY SAY (TOP 2 BOX)



TOP 2 BOX
A GOVERNMENT OFFICIAL

ASIA

35%
2017

34%
2019

GLOBAL

28%
2017

28%
2019



TOP 2 BOX
A CELEBRITY
(ACTOR, MUSICIAN)

ASIA

29%
2017

26%
2019

GLOBAL

25%
2017

26%
2019

	ASIA		GLOBAL	
	2017	2019	2017	2019
A UNIVERSITY PROFESSOR WHO IS AN EXPERT ON OIL / NATURAL GAS ISSUES*	56%	58% / 59%	69%	66% / 67%
A SCIENTIST AND ENGINEER WHO WORKS FOR AN OIL / NATURAL GAS COMPANY*	55%	57% / 58%	59%	56% / 58%
AN ENVIRONMENTAL ACTIVIST	54%	54%	56%	54%
A NEIGHBOR OR FRIEND WHO WORKS IN THE OIL / NATURAL GAS INDUSTRY*	49%	48% / 49%	52%	49% / 50%
AN INDUSTRY ASSOCIATION THAT REPRESENT OIL / NATURAL GAS COMPANIES*	42%	44% / 47%	40%	39% / 41%
AN OIL AND GAS COMPANY EXECUTIVE*	41%	41% / 45%	39%	38% / 40%
A JOURNALIST	41%	42%	43%	43%
A RESPECTED LOCAL COMMUNITY LEADER	43%	45%	45%	45%
A NATIVE OR ABORIGINAL LEADER	42%	40%	43%	41%
THE LEADER OF YOUR COUNTRY	41%	42%	37%	35%

*statements asked separately for oil and natural gas in 2019

PERSPECTIVES ON TRUST IN INDUSTRY

INDUSTRY	TRUST		NEUTRAL		DISTRUST		DON'T KNOW		
	ASIA	GLOBAL	ASIA	GLOBAL	ASIA	GLOBAL	ASIA	GLOBAL	
OIL AND GAS	43%	31%	40%	34%	11%	29%	5%	6%	2017
NATURAL GAS	45%	34%	40%	36%	9%	22%	6%	7%	
OIL	43%	29%	39%	32%	12%	32%	6%	7%	2019
NATURAL GAS	49%	35%	37%	35%	8%	23%	6%	7%	

TRUST BY COUNTRY (TOP 2 BOX)

OIL COMPANIES

TRUST A GREAT DEAL/TRUST A LITTLE

NATURAL GAS COMPANIES

TRUST A GREAT DEAL/TRUST A LITTLE

	2017	2019
SOUTH KOREA	34%	28%
CHINA	54%	59%
JAPAN	33%	35%
INDIA	53%	50%

	2017	2019
SOUTH KOREA	40%	36%
CHINA	60%	71%
JAPAN	28%	34%
INDIA	54%	54%

4. Global Energy Literacy and Perceptions

GLOBAL ENERGY PERSPECTIVES (TOP 3 BOX) EXTREMELY/VERY/SOMEWHAT FAVOURABLE

	ASIA		GLOBAL	
	2017	2019	2017	2019
SOLAR	95%	94%	96%	95%
WIND	94%	94%	94%	93%
HYDROELECTRIC (INCLUDING DAMS)	92%	94%	92%	93%
NATURAL GAS	89%	90%	82%	82%
OIL	63%	66%	57%	57%
NUCLEAR	59%	63%	54%	56%
COAL	48%	43%	49%	45%

5. Energy Perspectives

PERSPECTIVES ON TRUST IN INDUSTRY

INDUSTRY	AGREE		NEUTRAL		DISAGREE		DON'T KNOW	
	ASIA	GLOBAL	ASIA	GLOBAL	ASIA	GLOBAL	ASIA	GLOBAL
I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE	49%	43%	33%	27%	8%	20%	9%	10%
IT'S POSSIBLE FOR OIL AND GAS DEVELOPMENT TO BALANCE ECONOMIC BENEFITS AND THE ENVIRONMENTAL IMPACTS IN A WAY THAT PEOPLE LIKE ME CAN AGREE WITH	43%	40%	37%	31%	10%	17%	9%	12%
OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE	54%	46%	31%	28%	9%	17%	7%	9%
IT'S FEASIBLE AND PRACTICAL THAT IN TEN YEARS I WILL USE ALMOST NO OIL AND NATURAL GAS IN MY DAY-TO-DAY LIFE	32%	34%	35%	29%	24%	27%	9%	11%
THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES	38%	28%	37%	31%	16%	29%	9%	13%
I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE	51%	41%	32%	27%	7%	21%	9%	11%
IT'S POSSIBLE FOR OIL AND GAS DEVELOPMENT TO BALANCE ECONOMIC BENEFITS AND THE ENVIRONMENTAL IMPACTS IN A WAY THAT PEOPLE LIKE ME CAN AGREE WITH	44%	40%	38%	30%	9%	17%	9%	12%
OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE	56%	45%	30%	29%	7%	17%	7%	10%
IT'S FEASIBLE AND PRACTICAL THAT IN TEN YEARS I WILL USE ALMOST NO OIL AND NATURAL GAS IN MY DAY-TO-DAY LIFE	31%	34%	33%	28%	27%	28%	9%	11%
THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES	40%	29%	36%	30%	14%	28%	10%	13%

2017

2019

MANY COUNTRIES IMPORT OIL, WOULD YOU PREFER TO GET MORE OR LESS ENERGY FROM THIS COUNTRY?

	ASIA		GLOBAL			ASIA		GLOBAL	
	2017	2019	2017	2019		2017	2019	2017	2019
SAUDI ARABIA	37%	37%	22%	21%	VENEZUELA	24%	25%	19%	21%
UAE	33%	34%	21%	21%	CANADA	23%	25%	24%	26%
KUWAIT	32%	32%	21%	22%	NIGERIA	22%	24%	17%	18%
RUSSIA	27%	31%	18%	20%	UNITED STATES	22%	21%	21%	21%
IRAN	32%	30%	16%	17%	CHINA	15%	12%	16%	16%
IRAQ	29%	29%	18%	19%					

GLOBAL ATTITUDES ABOUT CANADIAN OIL AND GAS

INDUSTRY	AGREE		NEUTRAL		DISAGREE		DON'T KNOW	
	ASIA	GLOBAL	ASIA	GLOBAL	ASIA	GLOBAL	ASIA	GLOBAL
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS IMPORTED FROM ANOTHER COUNTRY	36%	31%	42%	35%	9%	15%	13%	19%
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD	35%	26%	41%	35%	8%	12%	17%	27%
CANADA'S OIL AND GAS IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACT	38%	33%	38%	31%	8%	11%	16%	25%
CRITICS VIEWS ABOUT CANADA'S OIL AND NATURAL GAS INDUSTRY TEND TO BE MORE ABOUT POLITICAL CONFRONTATION AND DON'T REALLY REFLECT THE REALITY OF WHAT'S GOING ON	31%	27%	44%	36%	9%	13%	17%	25%
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS IMPORTED FROM ANOTHER COUNTRY	35%	32%	40%	33%	11%	16%	14%	19%
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD	34%	27%	41%	34%	7%	13%	17%	26%
CANADA'S OIL AND GAS IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACT	39%	34%	38%	30%	7%	11%	16%	24%
CRITICS VIEWS ABOUT CANADA'S OIL AND NATURAL GAS INDUSTRY TEND TO BE MORE ABOUT POLITICAL CONFRONTATION AND DON'T REALLY REFLECT THE REALITY OF WHAT'S GOING ON	31%	28%	44%	35%	8%	13%	18%	24%

2017

2019