Australia

ANALYSIS

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 Australia have less favourable perceptions towards the collective industries tested than the rest of the global respondents. Results are notably lower than the global favourability measures for banking (21 percentage points), electricity utilities (20 percentage points), oil companies (17 percentage points) and natural gas companies (16 percentage points). Compared to 2017, impressions have improved for mining companies (7 points higher) and water utility companies (5 points higher).

On the question of trust, respondents were asked to focus on two industries specifically; oil and natural gas. Respondents in Australia express lower trust ratings compared to the global measures – 8 percentage points for both oil and natural gas. Compared to 2017, trust in natural gas companies has improved (5 points higher) while attitudes towards oil companies are consistent.

On the question of industry regulation, most respondents globally and in Australia feel that there is currently the right amount of regulation governing each industry. The exception in Australia is for banking (27 percentage points higher than the global average), oil (14 points higher) and natural gas companies (11 points higher) were respondents are more likely to think there is too little regulation. Compared to 2017, respondents in Australia are more likely to feel there is too little regulation in several sectors including: banking (10 points higher), oil (10 points higher), natural gas (7 points higher), electricity utilities (7 points higher), and mining (5 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.”

Compared to the global measurements, respondents in Australia have less favourable views about the oil and natural gas industries compared to the global measurements. For the oil industry, the gap between respondents in Australia and the global average are widest for the following attributes: is an industry that I trust (14 points lower), is responsive to the needs of customers (14 points lower), has a strong track record of behaving responsibly (13 points lower), charges a fair price for their products/services (12 points lower), and contributes to socioeconomic development in the communities where it operated (11 points lower). For natural gas companies, gaps are the widest gaps for: is an industry that I trust (13 points lower), charges a fair price for their products/services (11 points lower), is responsive to the needs of customers (10 points lower), has a strong track record of behaving responsibly (10 points lower), cares about the planet and our environment (10 points lower), and contributes to socioeconomic development in the communities where it operated (10 points lower). Compared to 2017, impressions of oil companies have improved for having strong record of financial performance (7 points higher).

2019 Global Energy Pulse

Ipsos CAPP CANADA'S OIL & NATURAL GAS PRODUCERS

1. Industry Reputation and Regulation

FAVOURABILITY BY INDUSTRY

INDUSTRY	FAVOURABLE				NEUTRAL				UNFAVOURABLE			
	AUSTRALIA		GLOBAL		AUSTRALIA		GLOBAL		AUSTRALIA		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
BANKING COMPANIES	32%	29%	48%	50%	38%	31%	32%	32%	29%	40%	20%	18%
AUTOMOTIVE COMPANIES	41%	40%	52%	52%	46%	47%	39%	38%	13%	13%	9%	10%
OIL COMPANIES	20%	22%	40%	38%	48%	40%	40%	38%	32%	38%	21%	24%
WATER UTILITY COMPANIES	35%	40%	50%	52%	50%	47%	37%	35%	15%	13%	13%	12%
NATURAL GAS COMPANIES	30%	31%	45%	47%	50%	47%	42%	40%	19%	22%	13%	14%
ELECTRICITY UTILITY COMPANIES	29%	29%	47%	49%	41%	36%	34%	32%	30%	34%	19%	18%
MINING COMPANIES	22%	29%	28%	31%	46%	40%	52%	47%	32%	31%	20%	21%

REGULATION BY INDUSTRY

INDUSTRY	TOO MUCH				ABOUT RIGHT				TOO LITTLE			
	AUSTRALIA		GLOBAL		AUSTRALIA		GLOBAL		AUSTRALIA		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
BANKING COMPANIES	6%	6%	21%	19%	46%	36%	47%	49%	48%	58%	32%	32%
AUTOMOTIVE COMPANIES	6%	7%	17%	18%	71%	68%	60%	57%	22%	25%	23%	25%
OIL COMPANIES	5%	7%	17%	17%	51%	40%	49%	44%	43%	53%	33%	39%
WATER UTILITY COMPANIES	6%	6%	14%	15%	68%	69%	59%	58%	26%	26%	27%	28%
NATURAL GAS COMPANIES	5%	7%	16%	16%	60%	51%	57%	54%	35%	42%	27%	30%
ELECTRICITY UTILITY COMPANIES	5%	5%	17%	18%	53%	46%	53%	50%	42%	49%	31%	32%
MINING COMPANIES	9%	10%	13%	14%	50%	45%	51%	46%	41%	46%	36%	39%

For natural gas companies, impressions have improved across a number of measures including: is well managed (8 points higher), has a positive impact on the economy (7 points higher), has a strong track record of financial performance (up 6 points), is an industry I can trust (5 points higher), behaving responsibility (6 points), and contributes to socioeconomic development of the communities where they operate (5 points).

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 Australia 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. Notably, trust in various industry representatives remains lower in Australia – primarily those affiliated with the oil and natural gas industry. The biggest differences are seen for: an oil company executive (18 points lower), an environmental activist (18 points lower), a natural gas company executive (16 points lower), an industry association that represents oil companies (15 points lower), a scientist or engineer who works for an oil company (14 points lower), an industry association that represents natural gas companies (13 points lower), and a scientist or engineer who works for a natural gas company (10 points lower).

Globally and in Australia, nearly half or more respondents have favourable views towards all prominent energy sources tested. Respondents in Australia are generally more favourable towards most sources. Renewables (solar and wind) and hydroelectric continue to be viewed most positively with more than ninety percent favourability both globally and in Australia. In Australia, nearly eight in ten respondents (79%) say that they have a favourable view about natural gas as an energy source (3 percentage points lower than globally) and nearly half (46%) share the same perspective about oil (11 percentage points lower than globally). Notably, Australian respondents also have less favourable views than global measures about burning wood (12 points lower) and burning waste (10 points lower). Compared to 2017, impressions have worsened for burning wood (16 points lower) and burning waste (15 points lower), while respondents in Australia view nuclear power more positively (8 points higher).

Consistent with the 2017 study, more than half (53%) of respondents in Australia agree that their lives are better today because of what oil and natural gas have made possible (8 points higher than the global measure). On the topic of environmental impacts, four in ten (42%) agree that it is possible for oil and natural gas development to balance economic benefits and environmental impacts (2 points higher than the global measure).

2. Industry Attributes

GLOBAL PERSPECTIVES ON KEY INDUSTRY ATTRIBUTES

INDUSTRY	OIL				MINING				NATURAL GAS			
	AUSTRALIA		GLOBAL		AUSTRALIA		GLOBAL		AUSTRALIA		GLOBAL	
	2017	**2019**	2017	**2019**	2017	**2019**	2017	**2019**	2017	**2019**	2017	**2019**
HAS A STRONG TRACK RECORD OF FINANCIAL PERFORMANCE	33%	**40%**	38%	**40%**	38%	**45%**	26%	**29%**	25%	**31%**	34%	**35%**
HAS A POSITIVE IMPACT ON THE ECONOMY IN...	27%	**30%**	39%	**40%**	41%	**49%**	30%	**32%**	28%	**35%**	39%	**38%**
PROVIDES HIGH QUALITY PRODUCTS OR SERVCES	23%	**26%**	32%	**33%**	25%	**33%**	24%	**27%**	26%	**30%**	34%	**35%**
IS WELL MANAGED	22%	**25%**	31%	**32%**	27%	**33%**	22%	**24%**	20%	**28%**	31%	**33%**
IS INNOVATIVE	22%	**24%**	30%	**31%**	24%	**33%**	21%	**23%**	24%	**27%**	32%	**32%**
CONTRIBUTES TO SOCIOECONOMIC DEVELOPMENT IN COMMUNITIES WHERE IT OPERATES	20%	**23%**	32%	**34%**	28%	**34%**	26%	**28%**	20%	**25%**	32%	**35%**
MAKES SURE HIGH SAFETY STANDARDS ARE MET IN ALL PLACES	25%	**27%**	31%	**31%**	31%	**33%**	23%	**25%**	27%	**31%**	34%	**35%**
IS AN INDUSTRY THAT I TRUST	12%	**15%**	29%	**29%**	14%	**21%**	21%	**24%**	16%	**21%**	32%	**34%**
IS RESPONSIVE TO THE NEEDS OF CUSTOMERS	15%	**15%**	28%	**29%**	16%	**21%**	20%	**22%**	18%	**22%**	30%	**32%**
HAS A STRONG TRACK RECORD OF CORPORATE SOCIAL RESPONSIBILITY*	14%	**15%**	27%	**28%**	15%	**20%**	20%	**23%**	15%	**21%**	29%	**31%**
WORKS ETHICALLY WITH POLITICIANS AND GOVERNMENT OFFICIALS	14%	**14%**	21%	**21%**	13%	**18%**	17%	**18%**	15%	**18%**	23%	**23%**
CARES ABOUT THE PLANET AND OUR ENVIRONMENT	12%	**13%**	22%	**22%**	11%	**17%**	18%	**19%**	20%	**20%**	29%	**30%**
CHARGES A FAIR PRICE FOR THEIR PRODUCTS/SERVICES	14%	**12%**	24%	**24%**	14%	**19%**	20%	**22%**	16%	**18%**	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.*

As with the global perspective, few respondents in Australia (32%) 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. Impressions also remain divided whether the industry is sincerely committed and working hard to reduce the amount of greenhouse gases it produces both globally and in Australia (three in ten agree with a similar proportion who disagree).

A key objective of this research initiative was to understand whether there was global interest in Canadian oil and natural gas, 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). Both globally and in Australia, Canada ranks as the top country for receiving more energy in terms of both oil and natural gas. However, Australian respondents are less likely compared with global measures to say they would prefer to get more energy from all other countries assessed. The largest differences are seen for Russia (13 points lower than the global measure), Saudia Arabia, Iraq, Kuwait, UAE, Nigeria, and Venezuela (11 points lower for each).

Despite the comparatively stronger rating for Canada, fewer respondents in Australia agree with statements about Canada's safety (4 points lower) and environmental record (6 points lower). Results are consistent with 2017.

3. Trust

TOP 2 BOX
A GOVERNMENT OFFICIAL

AUSTRALIA

30% 2017 — **26%** 2019

GLOBAL

28% 2017 — **28%** 2019

TOP 2 BOX
A CELEBRITY (ACTOR, MUSICIAN)

AUSTRALIA

18% 2017 — **12%** 2019

GLOBAL

25% 2017 — **26%** 2019

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

	AUSTRALIA		GLOBAL	
	2017	2019	2017	2019
A UNIVERSITY PROFESSOR WHO IS AN EXPERT ON OIL / NATURAL GAS ISSUES*	72%	68% / 70%	69%	66% / 67%
A SCIENTIST AND ENGINEER WHO WORKS FOR AN OIL / NATURAL GAS COMPANY*	49%	42% / 48%	59%	56% / 58%
A RESPECTED LOCAL COMMUNITY LEADER	47%	40%	45%	45%
AN ENVIRONMENTAL ACTIVIST	45%	36%	56%	54%
A NEIGHBOR OR FRIEND WHO WORKS IN THE OIL / NATURAL GAS INDUSTRY*	44%	40% / 40%	52%	49% / 50%
A NATIVE OR ABORIGINAL LEADER	38%	33%	43%	41%
A JOURNALIST	33%	31%	43%	43%
THE LEADER OF YOUR COUNTRY	32%	31%	37%	35%
AN INDUSTRY ASSOCIATION THAT REPRESENT OIL / NATURAL GAS COMPANIES*	27%	23% / 28%	40%	39% / 41%
AN OIL / NATURAL GAS COMPANY EXECUTIVE*	25%	20% / 24%	39%	38% / 40%

**statements asked separately for oil and natural gas in 2019*

PERSPECTIVES ON TRUST IN INDUSTRY

INDUSTRY	TRUST		NEUTRAL		DISTRUST		DON'T KNOW		
	AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL	
OIL AND GAS	18%	31%	36%	34%	40%	29%	7%	6%	2017
NATURAL GAS	22%	34%	42%	36%	29%	22%	8%	7%	2017
OIL	21%	29%	29%	32%	44%	32%	5%	7%	2019
NATURAL GAS	27%	35%	36%	35%	30%	23%	7%	7%	2019

4. Global Energy Literacy and Perceptions

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

	AUSTRALIA		GLOBAL	
	2017	2019	2017	2019
SOLAR	96%	**95%**	96%	**95%**
WIND	93%	**89%**	94%	**93%**
HYDROELECTRIC (INCLUDING DAMS)	92%	**94%**	92%	**93%**
NATURAL GAS	80%	**79%**	82%	**82%**
OIL	47%	**46%**	57%	**57%**
NUCLEAR	44%	**52%**	54%	**56%**
COAL	41%	**46%**	49%	**45%**

5. Energy Perspectives

PERSPECTIVES ON TRUST IN INDUSTRY

	INDUSTRY	AGREE		NEUTRAL		DISAGREE		DON'T KNOW	
		AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL
2017	I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE	50%	43%	27%	27%	7%	20%	16%	10%
2017	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	39%	40%	29%	31%	12%	17%	20%	12%
2017	OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE	49%	46%	27%	28%	10%	17%	15%	9%
2017	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%	27%	29%	23%	27%	19%	11%
2017	THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES	25%	28%	30%	31%	26%	29%	19%	13%
2019	I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE	**50%**	**41%**	**24%**	**27%**	**13%**	**21%**	**13%**	**11%**
2019	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	**42%**	**40%**	**27%**	**30%**	**14%**	**17%**	**17%**	**12%**
2019	OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE	**53%**	**45%**	**25%**	**29%**	**9%**	**17%**	**12%**	**10%**
2019	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%**	**24%**	**28%**	**28%**	**28%**	**16%**	**11%**
2019	THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES	**29%**	**29%**	**28%**	**30%**	**25%**	**28%**	**17%**	**13%**

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

	AUSTRALIA		GLOBAL	
	2017	2019	2017	2019
CANADA	22%	24%	24%	26%
UNITED STATES	16%	19%	21%	21%
UAE	11%	12%	21%	21%
SAUDI ARABIA	11%	12%	22%	21%
KUWAIT	10%	12%	21%	22%
VENEZUELA	11%	11%	19%	21%

	AUSTRALIA		GLOBAL	
	2017	2019	2017	2019
CHINA	9%	8%	16%	16%
IRAQ	9%	8%	18%	19%
NIGERIA	8%	9%	17%	18%
IRAN	8%	8%	16%	17%
RUSSIA	7%	7%	18%	20%

GLOBAL ATTITUDES ABOUT CANADIAN OIL AND GAS

INDUSTRY		AGREE		NEUTRAL		DISAGREE		DON'T KNOW	
		AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL	AUSTRALIA	GLOBAL
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS IMPORTED FROM ANOTHER COUNTRY	2017	32%	31%	31%	35%	6%	15%	31%	19%
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD	2017	22%	26%	30%	35%	5%	12%	42%	27%
CANADA'S OIL AND GAS IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACT	2017	25%	33%	28%	31%	4%	11%	42%	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	2017	21%	27%	32%	36%	6%	13%	41%	25%
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS IMPORTED FROM ANOTHER COUNTRY	2019	37%	32%	28%	33%	8%	16%	27%	19%
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD	2019	23%	27%	30%	34%	6%	13%	41%	26%
CANADA'S OIL AND GAS IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACT	2019	28%	34%	27%	30%	6%	11%	39%	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	2019	24%	28%	31%	35%	7%	13%	37%	24%