

2019 Global Energy Pulse



North America

ANALYSIS

Overall findings for the North America region in this study include research results from respondents living in Canada, the United States, and Mexico.

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.

Respondents in the North America region continue to have generally less favourable views towards all the collective industries tested than the rest of the global respondents. The largest differences in opinion are for oil companies (6 percentage points lower) and banking companies (6 percentage points lower). Compared to 2017, results are lower for banking companies (3 points higher) and electricity utilities (4 points higher).

Within North America, Mexican respondents were overall more favourable towards most sectors than Canadian and American respondents with the exception of mining where views were consistent. Canadian respondents were overall least favourable, including towards oil companies (8 point gap compared to North American total) and natural gas companies (9 point gap compared to North American total).

On the question of trust, respondents were asked to focus on the oil industry and natural gas industry. Respondents in the North America region continue to express lower trust ratings compared to global measures – 6 percentage points lower for oil and 4 percentage points lower for natural gas. These results are consistent with 2017. Within the region, trust in natural gas companies remains higher in the US and Mexico than in Canada while impressions are consistent for the oil industry across countries.

On the question of industry regulation, most respondents both globally and in the North America region feel there is currently the right amount of regulation governing each industry. The exception in North America is for oil companies where half of respondents feel there is too little regulation (10 points higher than the global measure). Notably, for natural gas, while the majority from North America feel there is the right amount of regulation, they are more likely to think there is too little compared to the global measure (5 points higher). Within North America, respondents from Mexico are more likely to say there was too little regulation for most industries including both the oil and natural gas sectors.

Compared to 2017, respondents in North America are more likely to think there is the right amount of regulation for banking companies (5 points higher) and electricity utilities (6 points), and too little for oil companies (3 points higher) and mining companies (3 points higher).

As part of 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 North America region continue to have less favourable views about the oil and natural gas industries compared to the global measurements.



1. Industry Reputation and Regulation

FAVOURABILITY BY INDUSTRY

INDUSTRY	FAVOURABLE				NEUTRAL				UNFAVOURABLE			
	NORTH AMERICA		GLOBAL		NORTH AMERICA		GLOBAL		NORTH AMERICA		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
BANKING COMPANIES	41%	44%	48%	50%	38%	37%	43%	32%	21%	19%	20%	18%
AUTOMOTIVE COMPANIES	46%	47%	52%	52%	44%	42%	28%	38%	10%	11%	9%	10%
OIL COMPANIES	32%	32%	40%	38%	38%	38%	40%	38%	30%	30%	21%	24%
WATER UTILITY COMPANIES	47%	47%	50%	52%	41%	40%	37%	35%	12%	12%	13%	12%
NATURAL GAS COMPANIES	40%	42%	45%	47%	46%	43%	42%	40%	14%	15%	13%	14%
ELECTRICITY UTILITY COMPANIES	42%	46%	47%	49%	40%	37%	34%	32%	19%	17%	19%	18%
MINING COMPANIES	25%	26%	28%	31%	52%	50%	52%	47%	20%	24%	20%	21%

REGULATION BY INDUSTRY

INDUSTRY	TOO MUCH				ABOUT RIGHT				TOO LITTLE			
	NORTH AMERICA		GLOBAL		NORTH AMERICA		GLOBAL		NORTH AMERICA		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
BANKING COMPANIES	16%	10%	21%	19%	52%	57%	47%	49%	35%	33%	32%	32%
AUTOMOTIVE COMPANIES	13%	11%	17%	18%	64%	65%	60%	57%	22%	24%	23%	25%
OIL COMPANIES	16%	13%	17%	17%	38%	38%	49%	44%	46%	49%	33%	39%
WATER UTILITY COMPANIES	11%	8%	14%	15%	60%	6%	59%	58%	30%	32%	27%	28%
NATURAL GAS COMPANIES	13%	10%	16%	16%	54%	56%	57%	54%	33%	35%	27%	30%
ELECTRICITY UTILITY COMPANIES	12%	10%	17%	18%	53%	59%	53%	50%	34%	31%	31%	32%
MINING COMPANIES	12%	9%	13%	14%	48%	47%	51%	46%	41%	44%	36%	39%

For the oil industry, the gaps between respondents in North America and the global average are widest for the following attributes: is an industry that I trust (12 points lower), is well managed (11 points lower), is responsive to consumer needs (11 points lower) and makes sure high safety standards are met in all places (9 points lower). For the natural gas industry, the largest gap compared to global measures are: is an industry that I trust (10 points lower), charges a fair price for products or services (7 points lower), makes sure high safety standards are met in all places (6 points lower), has a strong track record of behaving responsibly (7 points lower), and contributes to the socioeconomic development in communities where it operates (8 points lower).

Compared to 2017, respondents in North America provide higher ratings for oil companies on acting responsibly (3 points higher) and has a positive impact on the economy (3 points higher). Results are consistent with 2017 for natural gas companies. Within the North America region, favourability for oil and gas continues to be lower than global measurements for all three countries, with Canada ranking the lowest of the three countries in this region.

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 gas sector. The top-rated sources among respondents in the North America region are the same as those who are valued globally- a university professor who is an expert in oil or natural gas issues and a scientist or engineer who is an expert on oil or natural gas issues.

Respondents in North America are generally less likely to feel the latter source is credible. Notably, credibility is considerably lower in North America for an oil and gas company executive (9 pts lower than the global average), a natural gas company executive (7 points lower), and industry associations that represent either oil (9 points lower) or natural gas companies (8 points lower).

Globally, nearly one half or more of respondents continue to have favourable views towards all prominent energy sources tested. In the North America region, respondents are slightly less favourable towards most energy sources with the exception of renewables. Renewables (solar and wind) and hydroelectric continue to be viewed most positively with more than ninety percent favourability both globally and in the North America region. In North America, 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 closer to half (53%) share the same perspective about oil (4 percentage points lower than globally). Impressions of oil and natural gas as an energy source remain higher in Mexico and the US and lowest in Canada. Compared to 2017, impressions of a number of sources of energy have worsened including burning waste (18 points lower), burning wood (19 points lower), coal (10 points lower), gas from landfills (6 points lower) and, to a lesser extent, natural gas (3 points).

2. Industry Attributes

GLOBAL PERSPECTIVES ON KEY INDUSTRY ATTRIBUTES

INDUSTRY	OIL				MINING				NATURAL GAS			
	NORTH AMERICA		GLOBAL		NORTH AMERICA		GLOBAL		NORTH AMERICA		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
HAS A STRONG TRACK RECORD OF FINANCIAL PERFORMANCE	32%	32%	38%	40%	22%	22%	26%	29%	28%	29%	34%	35%
HAS A POSITIVE IMPACT ON THE ECONOMY IN...	33%	36%	39%	40%	28%	28%	30%	32%	33%	34%	39%	38%
PROVIDES HIGH QUALITY PRODUCTS OR SERVICES	24%	24%	32%	33%	21%	22%	24%	27%	29%	31%	34%	35%
IS WELL MANAGED	21%	21%	31%	32%	17%	17%	22%	24%	24%	26%	31%	33%
IS INNOVATIVE	23%	23%	30%	31%	18%	17%	21%	23%	29%	28%	32%	32%
CONTRIBUTES TO SOCIOECONOMIC DEVELOPMENT IN COMMUNITIES WHERE IT OPERATES	24%	26%	32%	34%	24%	23%	26%	28%	27%	27%	32%	35%
MAKES SURE HIGH SAFETY STANDARDS ARE MET IN ALL PLACES	24%	22%	31%	31%	21%	19%	23%	25%	28%	29%	34%	35%
IS AN INDUSTRY THAT I TRUST	18%	17%	29%	29%	16%	15%	21%	24%	24%	24%	32%	34%
IS RESPONSIVE TO THE NEEDS OF CUSTOMERS	20%	18%	28%	29%	16%	16%	20%	22%	26%	26%	29%	32%
HAS A STRONG TRACK RECORD OF BEHAVING RESPONSIBLY*	17%	20%	27%	28%	16%	16%	20%	23%	22%	24%	29%	31%
WORKS ETHICALLY WITH POLITICIANS AND GOVERNMENT OFFICIALS	15%	15%	21%	21%	14%	14%	17%	18%	20%	19%	23%	23%
CARES ABOUT THE PLANET AND OUR ENVIRONMENT	15%	15%	22%	22%	15%	13%	18%	19%	24%	23%	29%	30%
CHARGES A FAIR PRICE FOR THEIR PRODUCTS/SERVICES	17%	15%	24%	24%	16%	17%	20%	22%	22%	22%	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.



Consistent with the 2017 study, nearly half (49%) of respondents from North America agree that their lives are better today because of what oil and gas have made possible (4 percentage points higher than the global measure). On the topic of environmental impacts, more than four in ten (45%) respondents continue to agree that it is possible for oil and natural gas development to balance economic benefits and environmental impacts (5 percentage points higher than the global measure).

Similar to the global perspective, few respondents in the North America region (34%) 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 globally and in North America whether the industry is sincerely committed and working hard to reduce the amount of greenhouse gases it produces (nearly three in ten agree and a similar proportion disagree).

A key objective of this research initiative was to track global interest in Canadian oil and natural gas, comparing results against 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 energy from a series of top producing countries (excluding their country of residence). Opinions remain consistent with 2017. Both globally and in the North America region, Canada continues to rank as the top country for receiving more oil or natural gas. Respondents in North America are more likely to prefer Canada as their source for oil (7 points higher than the global measure) and natural gas (9 points higher). Within the region, respondents from the US are more likely to prefer to receive more oil from Canada than respondents from Mexico.

North American respondents were also more likely to agree with a statement about the environmental record of Canada's oil and gas industry (5 points higher than the global measure), while their impressions of the safety of operations is consistent with the global measure (1 point higher).

OIL AND NATURAL GAS

POSITIVE IMPACT ON THE ECONOMY

WELL ABOVE/SLIGHTLY ABOVE AVERAGE

	OIL		NATURAL GAS	
	2017	2019	2017	2019
TOTAL NORTH AMERICA	33%	36%	33%	34%
UNITED STATES	33%	34%	36%	36%
CANADA	35%	34%	31%	31%
MEXICO	30%	39%	33%	35%

HAS A STRONG TRACK RECORD OF FINANCIAL PERFORMANCE

WELL ABOVE/SLIGHTLY ABOVE AVERAGE

	OIL		NATURAL GAS	
	2017	2019	2017	2019
TOTAL NORTH AMERICA	32%	32%	28%	29%
UNITED STATES	31%	32%	30%	30%
CANADA	36%	31%	26%	25%
MEXICO	28%	31%	27%	32%

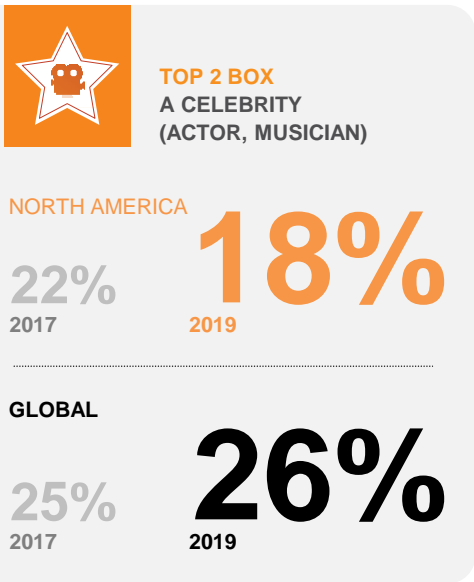
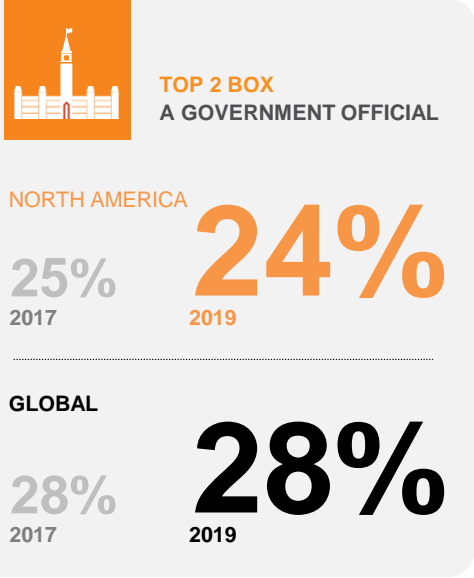
PROVIDES A HIGH QUALITY PRODUCT OR SERVICE

WELL ABOVE/SLIGHTLY ABOVE AVERAGE

	OIL		NATURAL GAS	
	2017	2019	2017	2019
TOTAL NORTH AMERICA	24%	24%	29%	31%
UNITED STATES	25%	26%	31%	33%
CANADA	21%	21%	24%	27%
MEXICO	25%	27%	32%	32%

3. Trust

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



	NORTH AMERICA		GLOBAL	
	2017	2019	2017	2019
A UNIVERSITY PROFESSOR WHO IS AN EXPERT ON OIL / NATURAL GAS ISSUES*	69%	69% / 68%	69%	66% / 67%
A SCIENTIST AND ENGINEER WHO WORKS FOR AN OIL / NATURAL GAS COMPANY*	57%	53% / 56%	59%	56% / 58%
AN ENVIRONMENTAL ACTIVIST	52%	49%	56%	54%
A NEIGHBOR OR FRIEND WHO WORKS IN THE OIL / NATURAL GAS INDUSTRY*	51%	47% / 46%	52%	49% / 50%
A RESPECTED LOCAL COMMUNITY LEADER	46%	43%	45%	45%
A JOURNALIST	44%	42%	43%	43%
A NATIVE OR ABORIGINAL LEADER	39%	37%	43%	41%
THE LEADER OF YOUR COUNTRY	34%	36%	37%	35%
AN INDUSTRY ASSOCIATION THAT REPRESENT OIL / NATURAL GAS COMPANIES*	33%	30% / 33%	40%	39% / 41%
AN OIL / NATURAL GAS COMPANY EXECUTIVE*	31%	29% / 33%	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		
	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL	
OIL AND GAS	25%	31%	28%	34%	42%	29%	4%	6%	2017
NATURAL GAS	30%	34%	35%	36%	29%	22%	6%	7%	
OIL	23%	29%	29%	32%	42%	32%	6%	7%	2019
NATURAL GAS	31%	35%	34%	35%	29%	23%	6%	7%	

TRUST BY COUNTRY (TOP 2 BOX)

OIL COMPANIES	TRUST A GREAT DEAL/TRUST A LITTLE	
	2017	2019
UNITED STATES	25%	24%
CANADA	18%	21%
MEXICO	33%	25%

NATURAL GAS COMPANIES	TRUST A GREAT DEAL/TRUST A LITTLE	
	2017	2019
UNITED STATES	30%	33%
CANADA	23%	27%
MEXICO	37%	32%

4. Global Energy Literacy and Perceptions

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

	NORTH AMERICA		GLOBAL	
	2017	2019	2017	2019
SOLAR	96%	96%	96%	95%
WIND	94%	94%	94%	93%
HYDROELECTRIC (INCLUDING DAMS)	93%	94%	92%	93%
NATURAL GAS	82%	79%	82%	82%
OIL	55%	53%	57%	57%
NUCLEAR	52%	51%	54%	56%
COAL	49%	39%	49%	45%

5. Energy Perspectives

PERSPECTIVES ON TRUST IN INDUSTRY

INDUSTRY	AGREE		NEUTRAL		DISAGREE		DON'T KNOW	
	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL
	<hr/>							
I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE	40%	43%	27%	27%	24%	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	44%	40%	30%	31%	16%	17%	9%	12%
OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE	47%	46%	28%	28%	18%	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	37%	34%	27%	29%	27%	27%	9%	11%
THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES	30%	28%	29%	31%	31%	29%	9%	13%
<hr/>								
I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE	40%	41%	26%	27%	25%	21%	10%	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	45%	40%	29%	30%	16%	17%	10%	12%
OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE	49%	45%	27%	29%	16%	17%	8%	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	34%	34%	27%	28%	30%	28%	10%	11%
THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES	30%	29%	29%	30%	31%	28%	10%	13%

2017

2019

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

	NORTH AMERICA		GLOBAL			NORTH AMERICA		GLOBAL	
	2017	2019	2017	2019		2017	2019	2017	2019
CANADA	33%	33%	24%	26%	CHINA	12%	10%	16%	16%
UNITED STATES	19%	17%	21%	21%	NIGERIA	11%	10%	17%	18%
VENEZUELA	16%	15%	19%	21%	IRAQ	10%	9%	18%	19%
SAUDI ARABIA	14%	13%	22%	21%	IRAN	11%	9%	16%	17%
UAE	13%	13%	21%	21%	RUSSIA	11%	10%	18%	20%
KUWAIT	13%	11%	21%	22%					

GLOBAL ATTITUDES ABOUT CANADIAN OIL AND GAS

INDUSTRY	AGREE		NEUTRAL		DISAGREE		DON'T KNOW	
	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL	NORTH AMERICA	GLOBAL
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS IMPORTED FROM ANOTHER COUNTRY	45%	31%	28%	35%	13%	15%	14%	19%
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD	29%	26%	35%	35%	12%	12%	24%	27%
CANADA'S OIL AND GAS IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACT	39%	33%	29%	31%	10%	11%	22%	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	33%	27%	34%	36%	11%	13%	22%	25%
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS IMPORTED FROM ANOTHER COUNTRY	47%	32%	26%	33%	13%	16%	15%	19%
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD	28%	27%	37%	34%	10%	13%	25%	26%
CANADA'S OIL AND GAS IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACT	39%	34%	29%	30%	9%	11%	23%	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	34%	28%	33%	35%	11%	13%	22%	24%

2017

2019