Europe

ANALYSIS

Overall findings for the Europe region in this study include research results from respondents living in Belgium, France, Germany, Great Britain, Hungary, Italy, Poland, Spain, and Sweden.

In an effort to set the operating context for perceptions of the industry's 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 Europe region continue to have less favourable perceptions towards the collective industries tested than the rest of the global respondents. The largest differences in opinion are for banking companies (16 percentage points lower than the global measure), oil companies (16 points lower), and natural gas companies (13 points lower). Results are consistent with the 2017 study. Within Europe, opinions towards all sectors were more favourable among those in Poland or Italy and lower in Germany, France, or Hungary.

On the question of trust, respondents were asked to focus on two industries specifically; oil and natural gas. Compared to the global average, respondents in the Europe region express lower trust for both industries– 14 percentage points lower for oil and 13 percentage points lower for natural gas. Compared to 2017, impressions of oil companies have declined marginally (4 points lower), while impressions are consistent for natural gas. Within Europe, trust in the oil industry is highest in Great Britain and for the natural gas industry it is highest in Italy. For both industries, trust is lowest in Germany.

On the question of industry regulation, results highlight that most respondents in Europe and globally continue to feel there is currently the right amount of regulation governing most industries. The two exceptions are banking and the oil industry. Just under half (47%) of respondents in Europe feel the oil industry has too little regulation (8 percentage points higher than globally), while more than four in ten (43%) say the banking industry has too little regulation (11 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 Europe region continue to have less favourable views about the oil and natural gas industries compared to global measurements across all measures. For the oil industry, the gap between respondents in Europe and the global measure are widest for the following attributes: has a positive impact on the economy (14 points lower), is an industry that I trust (13 points lower), contributes to socioeconomic development in communities where it operates (12 points lower), and has a strong track record of behaving responsibly (12 points lower). For the natural gas industry, the gaps are widest for a similar set of attributes: has a positive impact on the economy (13 points lower), is an industry that I trust (13 points lower), contributes to socioeconomic development in communities where it operates (12 points lower) has a strong track record of behaving responsibly (12 points lower), and charges a fair price for their products/services (12 points lower). Opinions towards both industries remain consistent with the 2017 study.

2019 Global Energy Pulse

Ipsos
CAPP CANADA'S OIL & NATURAL GAS PRODUCERS

1. Industry Reputation and Regulation

FAVOURABILITY BY INDUSTRY

INDUSTRY	FAVOURABLE				NEUTRAL				UNFAVOURABLE			
	EUROPE		GLOBAL		EUROPE		GLOBAL		EUROPE		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
BANKING COMPANIES	30%	34%	48%	50%	38%	39%	32%	32%	32%	27%	20%	18%
AUTOMOTIVE COMPANIES	41%	40%	52%	52%	47%	47%	39%	38%	12%	13%	9%	10%
OIL COMPANIES	23%	22%	40%	38%	47%	45%	40%	38%	29%	33%	21%	24%
WATER UTILITY COMPANIES	39%	43%	50%	52%	47%	44%	37%	35%	14%	12%	13%	12%
NATURAL GAS COMPANIES	30%	33%	45%	47%	51%	49%	42%	40%	18%	18%	13%	14%
ELECTRICITY UTILITY COMPANIES	35%	38%	47%	49%	43%	42%	34%	32%	22%	20%	19%	18%
MINING COMPANIES	21%	23%	28%	31%	60%	55%	52%	47%	19%	22%	20%	21%

REGULATION BY INDUSTRY

INDUSTRY	TOO MUCH				ABOUT RIGHT				TOO LITTLE			
	EUROPE		GLOBAL		EUROPE		GLOBAL		EUROPE		GLOBAL	
	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019	2017	2019
BANKING COMPANIES	12%	12%	21%	19%	42%	45%	47%	49%	46%	43%	32%	32%
AUTOMOTIVE COMPANIES	11%	11%	17%	18%	62%	59%	60%	57%	28%	30%	23%	25%
OIL COMPANIES	9%	9%	17%	17%	51%	44%	49%	44%	40%	47%	33%	39%
WATER UTILITY COMPANIES	8%	9%	14%	15%	64%	63%	59%	58%	28%	28%	27%	28%
NATURAL GAS COMPANIES	9%	9%	16%	16%	59%	56%	57%	54%	32%	35%	27%	30%
ELECTRICITY UTILITY COMPANIES	10%	11%	17%	18%	56%	55%	53%	50%	34%	34%	31%	32%
MINING COMPANIES	18%	9%	13%	14%	56%	53%	51%	46%	35%	38%	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 gas sector.

The top-rated sources among respondents in the Europe 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. Notably, most sources continue to receive somewhat lower scores in Europe than the global average (3 to 9 percentage points different) including for an oil or natural gas company executive (9 pts lower for both).

Globally, nearly half or more respondents have favourable views towards all prominent energy sources tested. Respondents in Europe are generally less favourable towards most sources of energy. Renewables (solar and wind) and hydroelectric continue to be viewed most positively with more than ninety percent favourability both globally and in the Europe region. In the Europe region, nearly three quarters have a favourable view of natural gas (9 percentage points lower than the global measure), while four in ten feel favourable towards oil (18 points lower). Compared to 2017, impressions have worsened towards coal (4 points lower), burning waste (6 points lower), burning wood (6 points lower), and oil (3 points lower).

Consistent with the 2017 study, forty percent (40%) of respondents in the Europe region agree that their lives are better today because of what oil and gas have made possible however, lower than the global average (5 percentage points lower). On the topic of environmental impacts, three in ten respondents (31%) agree that it is possible for oil and natural gas development to balance economic benefits and environmental impacts, also lower than the global measure (9 percentage points lower).

Similar to the global perspective, few respondents in the Europe region (32%) agree outright 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. In Europe, there is greater skepticism that the industry is sincerely committed and working hard to reduce the amount of greenhouse gases it produces (only two in ten agree – 10 points lower than the global measure).

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.

2. Industry Attributes

GLOBAL PERSPECTIVES ON KEY INDUSTRY ATTRIBUTES

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

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 Europe region, Canada continues to rank as the top country for receiving more oil or natural gas. However, respondents in Europe are generally less likely to prefer more oil or natural gas from all countries compared to the global average (5 to 9 percentage points).

Despite the comparatively strong ranking for Canada, respondents in the Europe region continue to be less likely to agree with statements about Canada's safety (6 points lower) and environmental record (7 points lower) 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 EUROPE	25%	25%	26%	26%
BELGIUM	16%	21%	20%	22%
HUNGARY	26%	21%	20%	20%
POLAND	33%	29%	32%	32%
GREAT BRITAIN	24%	33%	23%	31%
FRANCE	22%	21%	29%	23%
SWEDEN	15%	21%	18%	19%
GERMANY	22%	18%	22%	20%
SPAIN	20%	32%	24%	23%
ITALY	16%	13%	21%	22%

HAS A STRONG TRACK RECORD OF FINANCIAL PERFORMANCE

WELL ABOVE/SLIGHTLY ABOVE AVERAGE

	OIL		NATURAL GAS	
	2017	2019	2017	2019
TOTAL EUROPE	30%	32%	25%	26%
BELGIUM	23%	28%	23%	25%
HUNGARY	29%	31%	20%	26%
POLAND	43%	37%	31%	32%
GREAT BRITAIN	28%	38%	21%	30%
FRANCE	34%	33%	30%	25%
SWEDEN	32%	40%	23%	21%
GERMANY	18%	19%	15%	16%
SPAIN	27%	26%	25%	24%
ITALY	20%	24%	19%	20%

PROVIDES A HIGH QUALITY PRODUCT OR SERVICE

WELL ABOVE/SLIGHTLY ABOVE AVERAGE

	OIL		NATURAL GAS	
	2017	2019	2017	2019
TOTAL EUROPE	21%	23%	23%	24%
BELGIUM	17%	20%	21%	26%
HUNGARY	20%	19%	18%	18%
POLAND	33%	25%	28%	26%
GREAT BRITAIN	20%	27%	19%	26%
FRANCE	19%	15%	29%	24%
SWEDEN	18%	22%	21%	24%
GERMANY	20%	19%	22%	20%
SPAIN	16%	28%	19%	20%
ITALY	13%	12%	18%	19%

3. Trust

TOP 2 BOX
A GOVERNMENT OFFICIAL

	2017	2019
EUROPE	25%	25%
GLOBAL	28%	28%

TOP 2 BOX
A CELEBRITY
(ACTOR, MUSICIAN)

	2017	2019
EUROPE	20%	22%
GLOBAL	25%	26%

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

	EUROPE		GLOBAL	
	2017	2019	2017	2019
A UNIVERSITY PROFESSOR WHO IS AN EXPERT ON OIL / NATURAL GAS ISSUES*	68%	64% / 65%	69%	66% / 67%
A SCIENTIST AND ENGINEER WHO WORKS FOR AN OIL / NATURAL GAS COMPANY*	54%	49% / 53%	59%	56% / 58%
A NEIGHBOR OR FRIEND WHO WORKS IN THE OIL / NATURAL GAS INDUSTRY*	48%	46% / 48%	52%	49% / 50%
AN ENVIRONMENTAL ACTIVIST	47%	47%	56%	54%
A RESPECTED LOCAL COMMUNITY LEADER	39%	40%	45%	45%
A NATIVE OR ABORIGINAL LEADER	39%	39%	43%	41%
A JOURNALIST	38%	38%	43%	43%
THE LEADER OF YOUR COUNTRY	34%	32%	37%	35%
AN INDUSTRY ASSOCIATION THAT REPRESENT OIL / NATURAL GAS COMPANIES*	32%	30% / 33%	40%	39% / 41%
AN OIL / NATURAL GAS COMPANY EXECUTIVE*	30%	29% / 31%	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	
		EUROPE	GLOBAL	EUROPE	GLOBAL	EUROPE	GLOBAL	EUROPE	GLOBAL
2017	OIL AND GAS	20%	31%	37%	34%	36%	29%	7%	6%
2017	NATURAL GAS	24%	34%	40%	36%	28%	22%	8%	7%
2019	OIL	16%	29%	37%	32%	40%	32%	7%	7%
2019	NATURAL GAS	22%	35%	41%	35%	30%	23%	7%	7%

TRUST BY COUNTRY (TOP 2 BOX)

OIL COMPANIES — TRUST A GREAT DEAL/TRUST A LITTLE

	2017	2019
BELGIUM	17%	14%
HUNGARY	22%	16%
POLAND	25%	14%
GREAT BRITAIN	14%	19%
FRANCE	18%	13%
SWEDEN	16%	14%
GERMANY	15%	12%
SPAIN	18%	13%
ITALY	19%	15%

NATURAL GAS COMPANIES — TRUST A GREAT DEAL/TRUST A LITTLE

	2017	2019
BELGIUM	23%	21%
HUNGARY	25%	22%
POLAND	27%	19%
GREAT BRITAIN	17%	23%
FRANCE	29%	21%
SWEDEN	24%	23%
GERMANY	15%	14%
SPAIN	23%	20%
ITALY	28%	29%

4. Global Energy Literacy and Perceptions

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

	EUROPE		GLOBAL	
	2017	2019	2017	2019
SOLAR	96%	96%	96%	95%
WIND	94%	94%	94%	93%
HYDROELECTRIC (INCLUDING DAMS)	92%	94%	92%	93%
NATURAL GAS	73%	73%	82%	82%
OIL	42%	39%	57%	57%
NUCLEAR	47%	48%	54%	56%
COAL	38%	34%	49%	45%

5. Energy Perspectives

PERSPECTIVES ON TRUST IN INDUSTRY

INDUSTRY	AGREE		NEUTRAL		DISAGREE		DON'T KNOW		
	EUROPE	GLOBAL	EUROPE	GLOBAL	EUROPE	GLOBAL	EUROPE	GLOBAL	
I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE	44%	43%	28%	27%	13%	20%	14%	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	30%	40%	35%	31%	18%	17%	17%	12%	2017
OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE	41%	46%	31%	28%	16%	17%	12%	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%	31%	29%	25%	27%	14%	11%	2017
THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES	17%	28%	33%	31%	32%	29%	18%	13%	2017
I AM MORE LIKELY TO SUPPORT MY COUNTRY IMPORTING ENERGY FROM COUNTRIES THAT HAVE A PLAN TO FIGHT CLIMATE CHANGE	45%	41%	29%	27%	11%	21%	15%	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	31%	40%	36%	30%	15%	17%	18%	12%	2019
OUR LIVES ARE BETTER TODAY BECAUSE OF WHAT OIL AND GAS MAKES POSSIBLE	40%	45%	32%	29%	14%	17%	13%	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%	31%	28%	23%	28%	14%	11%	2019
THE OIL AND NATURAL GAS INDUSTRY IS SINCERELY COMMITTED AND WORKING HARD TO REDUCE THE AMOUNT OF GREENHOUSE GASES IT PRODUCES	19%	29%	33%	30%	29%	28%	18%	13%	2019

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

	EUROPE		GLOBAL	
	2017	2019	2017	2019
CANADA	20%	21%	24%	26%
UNITED STATES	14%	14%	21%	21%
VENEZUELA	12%	13%	19%	21%
UAE	11%	13%	21%	21%
KUWAIT	10%	13%	21%	22%
SAUDI ARABIA	10%	12%	22%	21%

	EUROPE		GLOBAL	
	2017	2019	2017	2019
RUSSIA	10%	12%	18%	20%
NIGERIA	9%	12%	17%	18%
CHINA	9%	10%	16%	16%
IRAN	8%	10%	16%	17%
IRAQ	8%	10%	18%	19%

GLOBAL ATTITUDES ABOUT CANADIAN OIL AND GAS

INDUSTRY	AGREE		NEUTRAL		DISAGREE		DON'T KNOW		
	EUROPE	GLOBAL	EUROPE	GLOBAL	EUROPE	GLOBAL	EUROPE	GLOBAL	
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS IMPORTED FROM ANOTHER COUNTRY	28%	31%	36%	35%	12%	15%	24%	19%	2017
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD	20%	26%	35%	35%	11%	12%	33%	27%	2017
CANADA'S OIL AND GAS IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACT	24%	33%	34%	31%	10%	11%	32%	25%	2017
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	21%	27%	37%	36%	11%	13%	30%	25%	2017
GIVEN THE CHOICE, I WOULD CHOOSE CANADIAN OIL AND GAS IMPORTED FROM ANOTHER COUNTRY	28%	32%	35%	33%	13%	16%	24%	19%	2019
CANADA'S OIL AND GAS IS THE SAFEST AND MOST RESPONSIBLY PRODUCED IN THE WORLD	21%	27%	36%	34%	9%	13%	33%	26%	2019
CANADA'S OIL AND GAS IS INVENTING AND USING LEADING EDGE TECHNOLOGIES TO MINIMIZE ENVIRONMENTAL IMPACT	26%	34%	34%	30%	8%	11%	32%	24%	2019
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	23%	28%	38%	35%	10%	13%	30%	24%	2019