Rising to the Communications Challenge

Matt Most

July 7, 2020

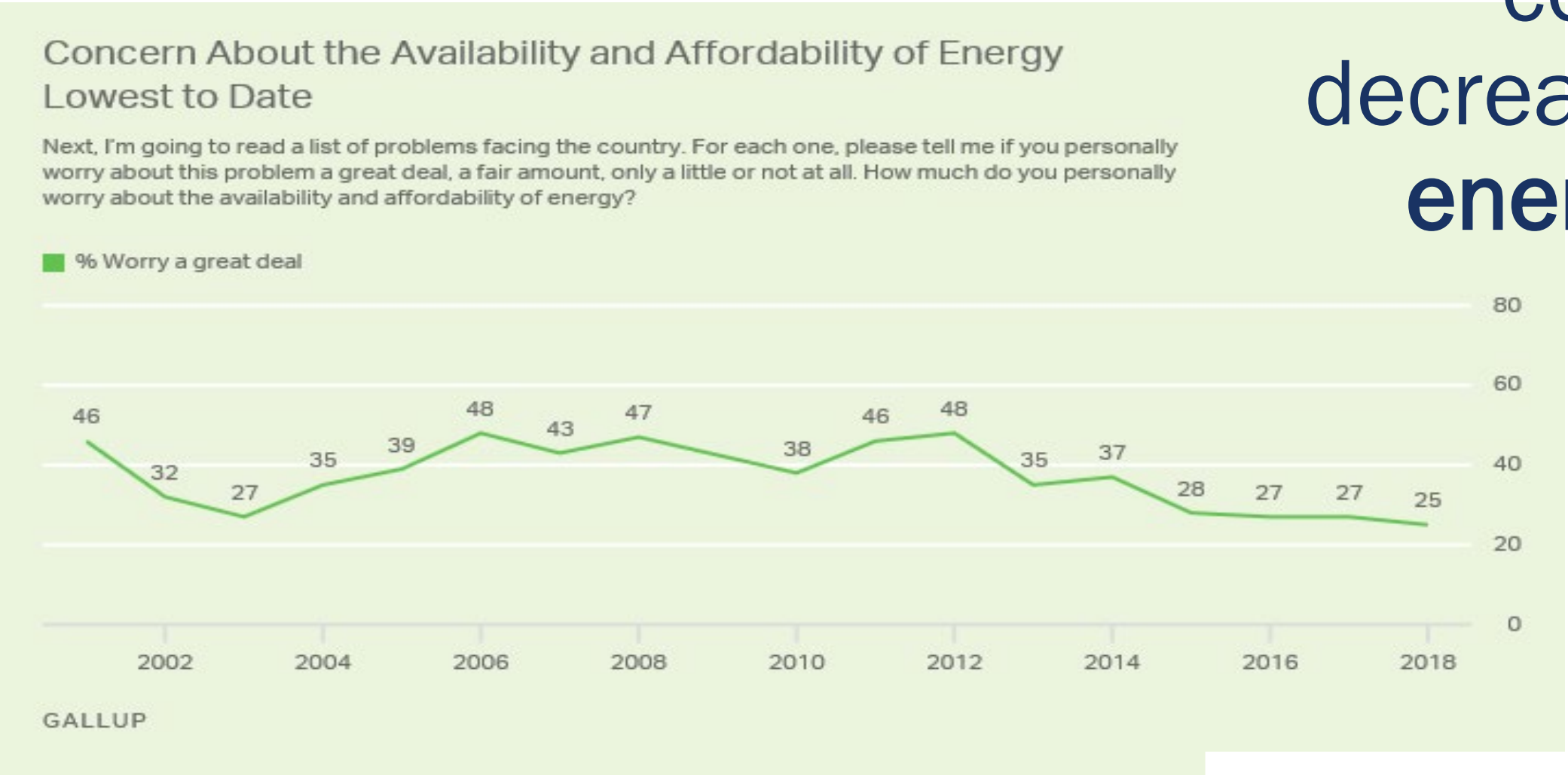
Ovintiv™

AGENDA

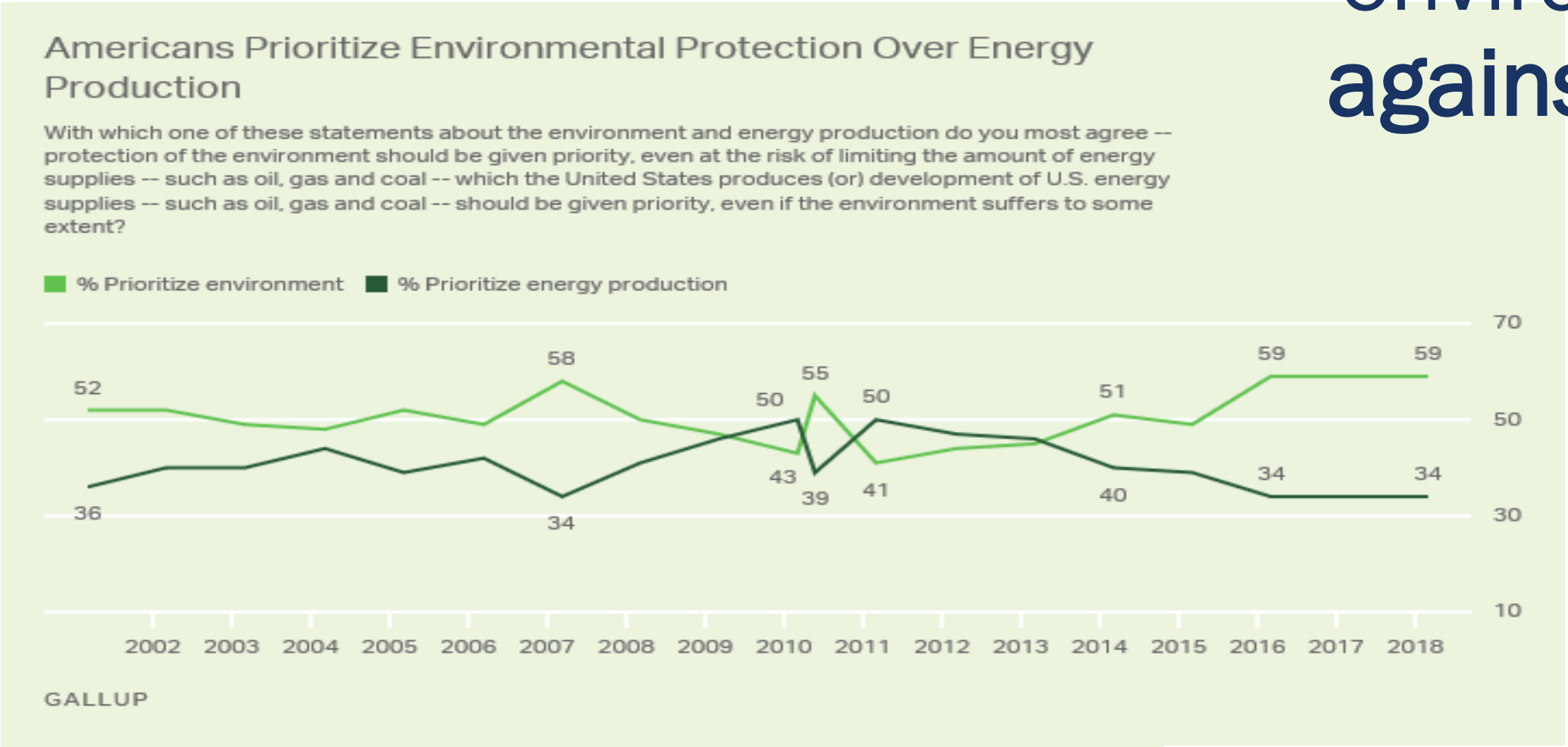
Ovintiv

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

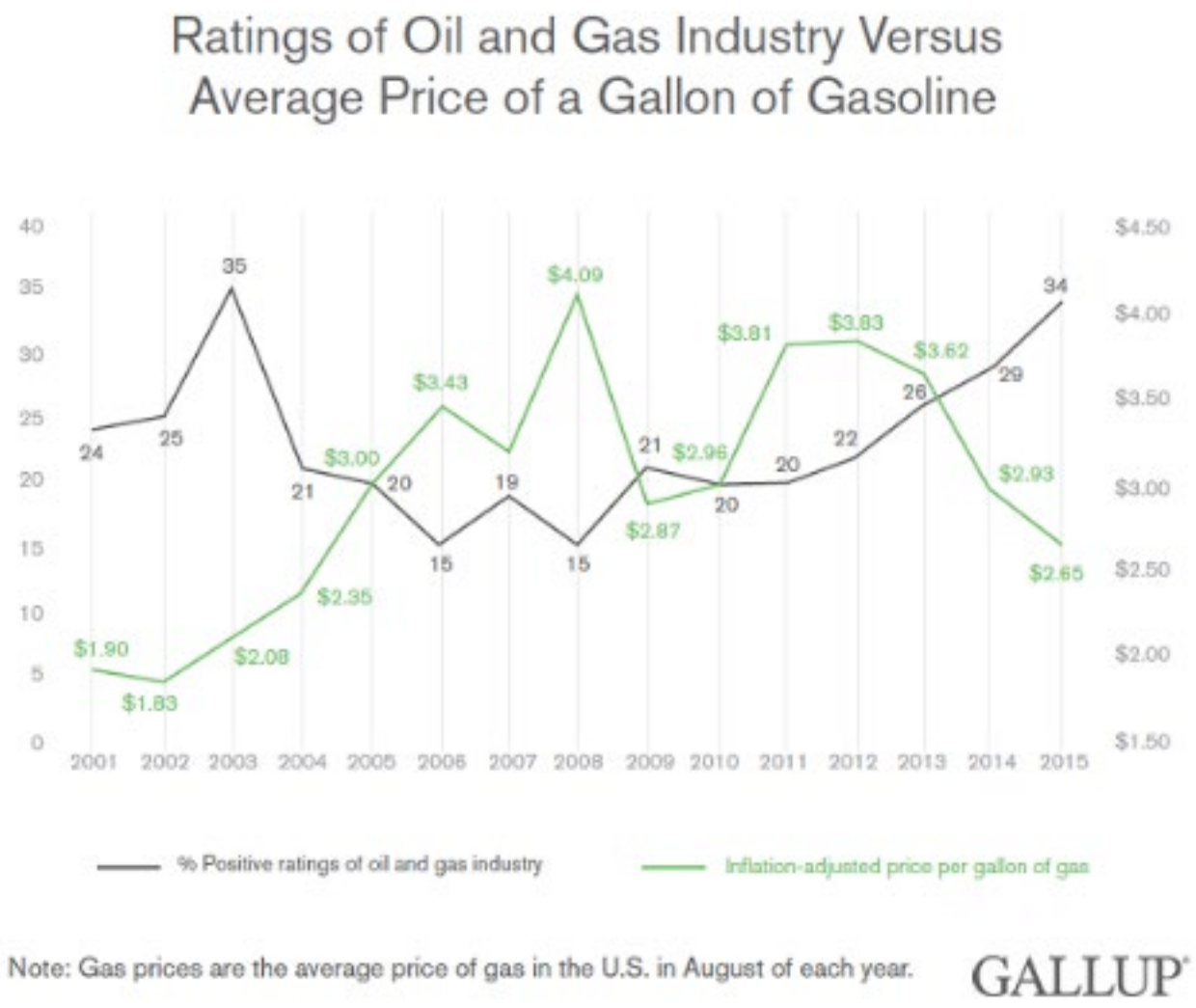
Energy affordability concerns decrease **with energy cost**



Perceptions put energy and environment **against each other**



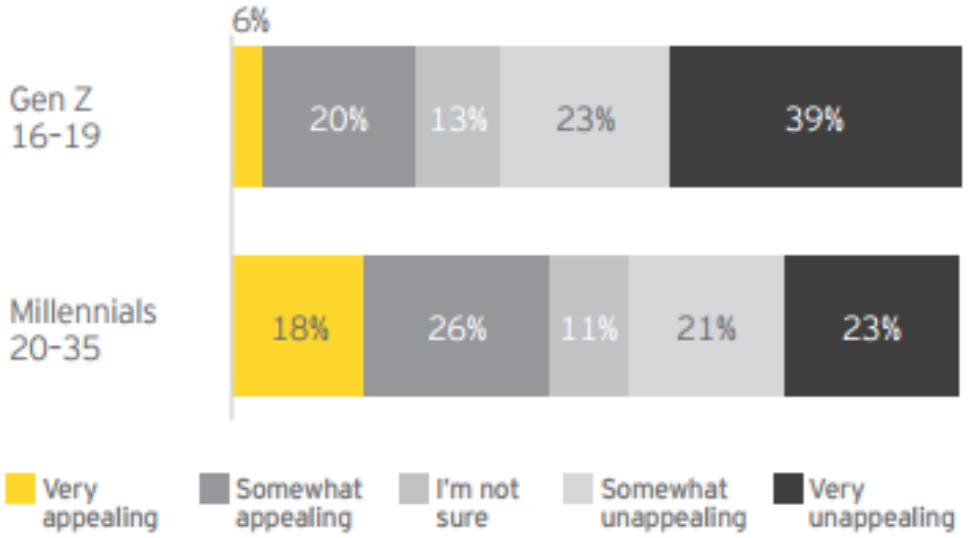
Perceptions of the industry are **not tied to what it can control**



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?

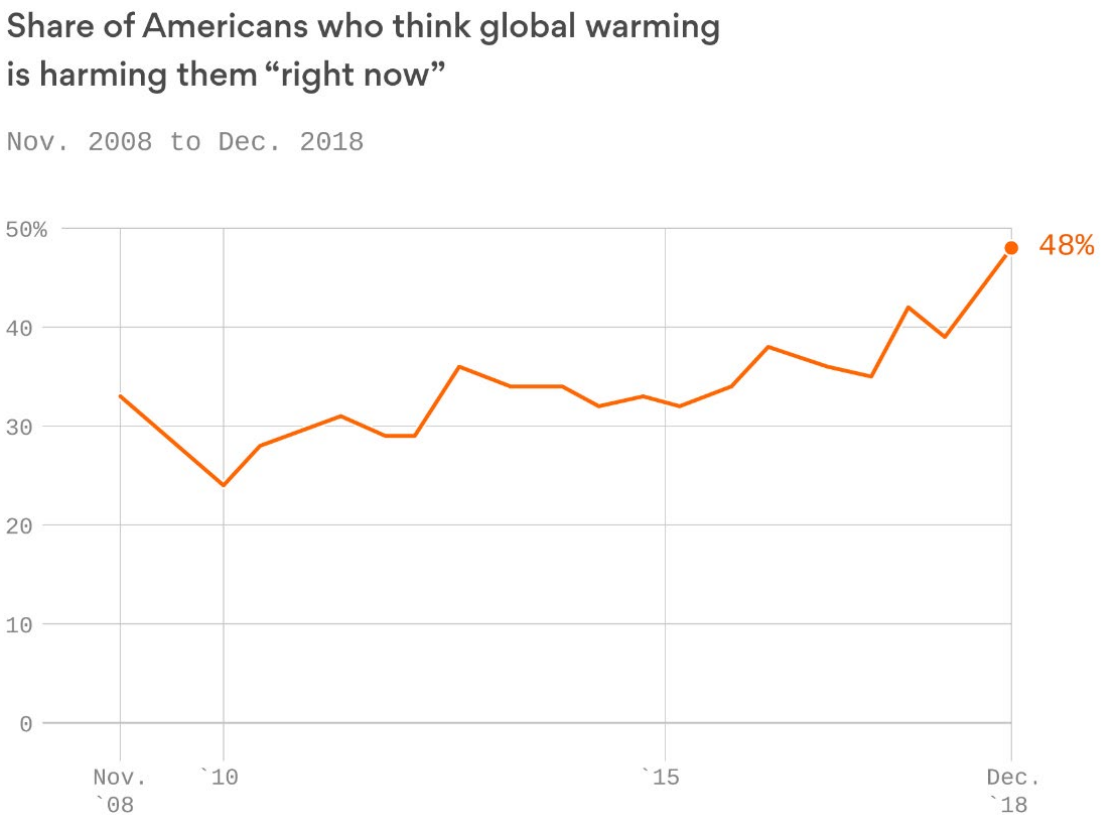


By a narrow margin (+3%), executives believe oil and gas careers are appealing to young people. By a wider margin (-11%), the young people surveyed said those jobs are unappealing.

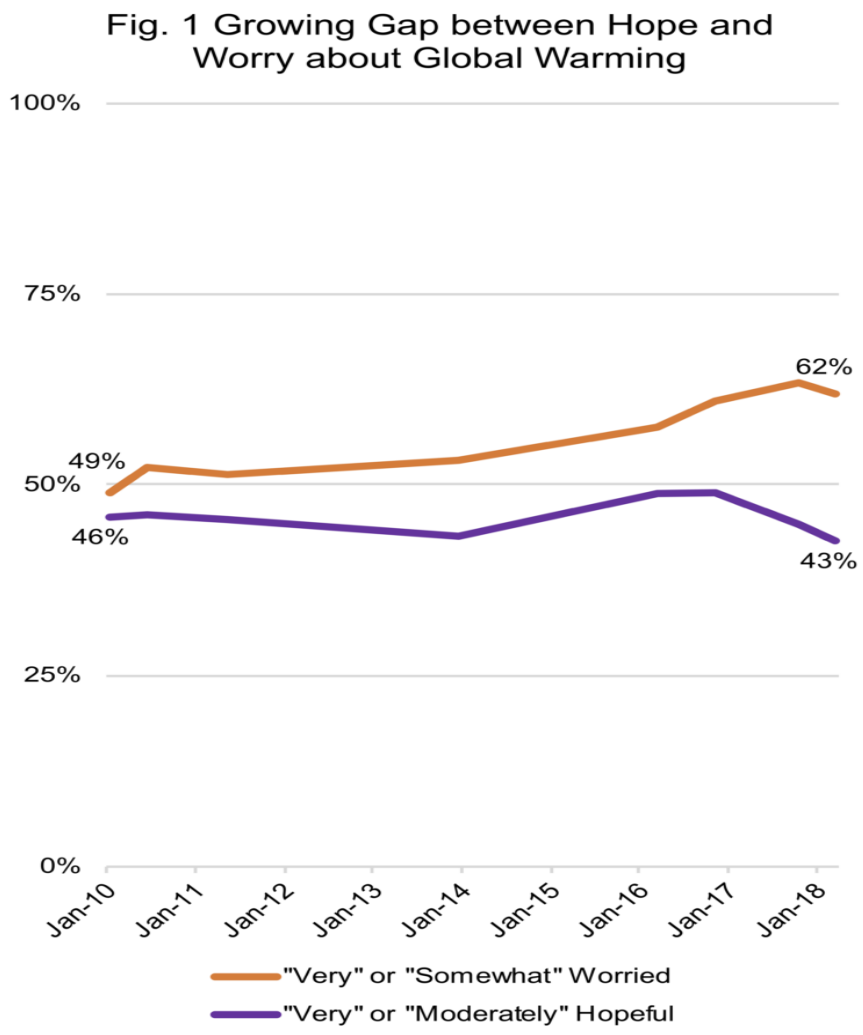
Source: EY 2017 – How do we regenerate this generation's view of oil and gas?

ROLE OF CLIMATE

Fear & Hope



Data: Yale Program on Climate Change Communication; Chart: Chris Canipe/Axios



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

NBC
WSJ

Climate Change

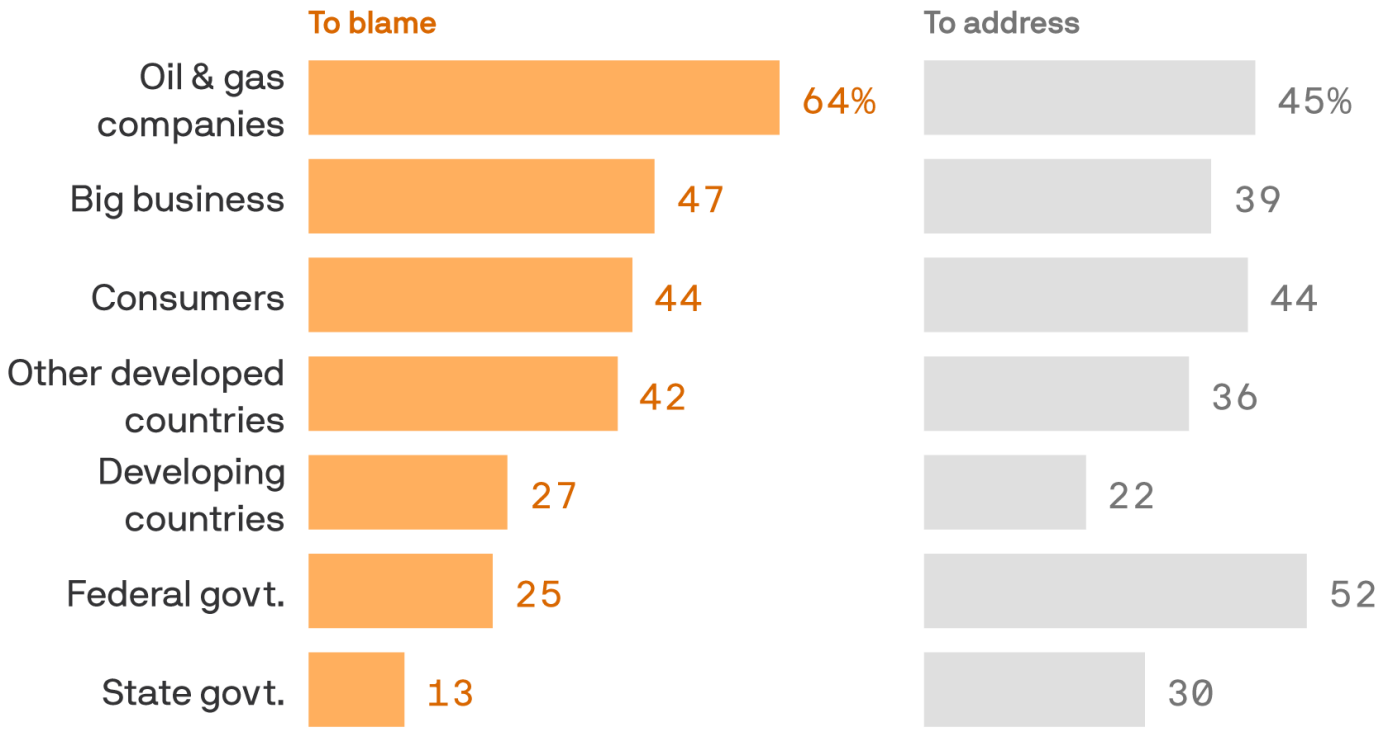
	July 1999	June 2006	Jan 2007	Oct 2009	Dec 2009	June 2014	April 2017
Immediate Action	23%	29%	34%	29%	23%	31%	39%
Some Action	28%	30%	30%	27%	31%	30%	28%
TOTAL TAKE ACTION	51%	59%	64%	56%	54%	61%	67%
NET DIFFERENCE	+8%	+22%	+31%	+14%	+13%	+24%	+35%
TOTAL NO ACTION	43%	37%	33%	42%	41%	37%	32%
Don't Know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

9

Bias to Blame

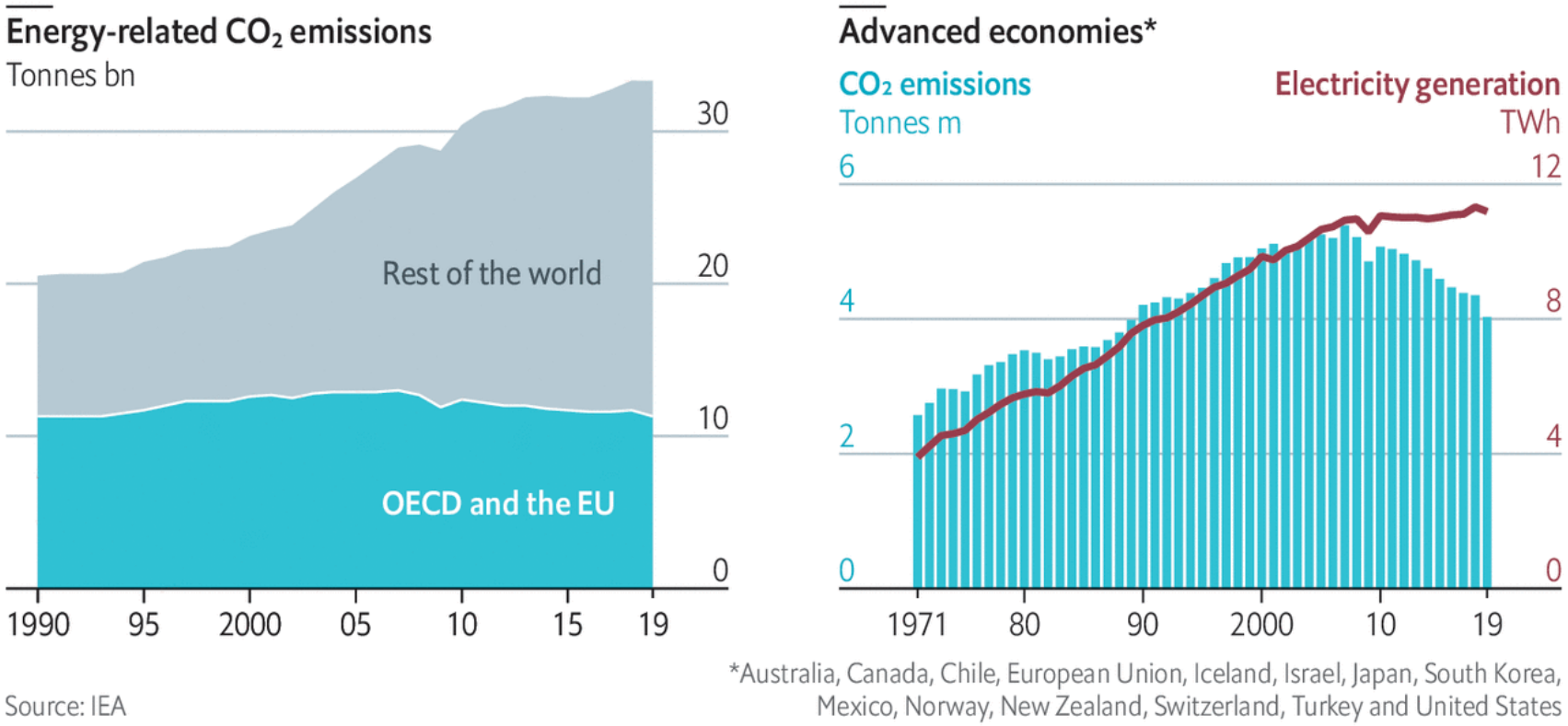
Assigning blame for climate change and burden to address it

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



Data: Brunswick Group survey of 1,000 registered U.S. voters conducted Dec. 3–13. Margin of error ±3.02; Chart: Axios Visuals

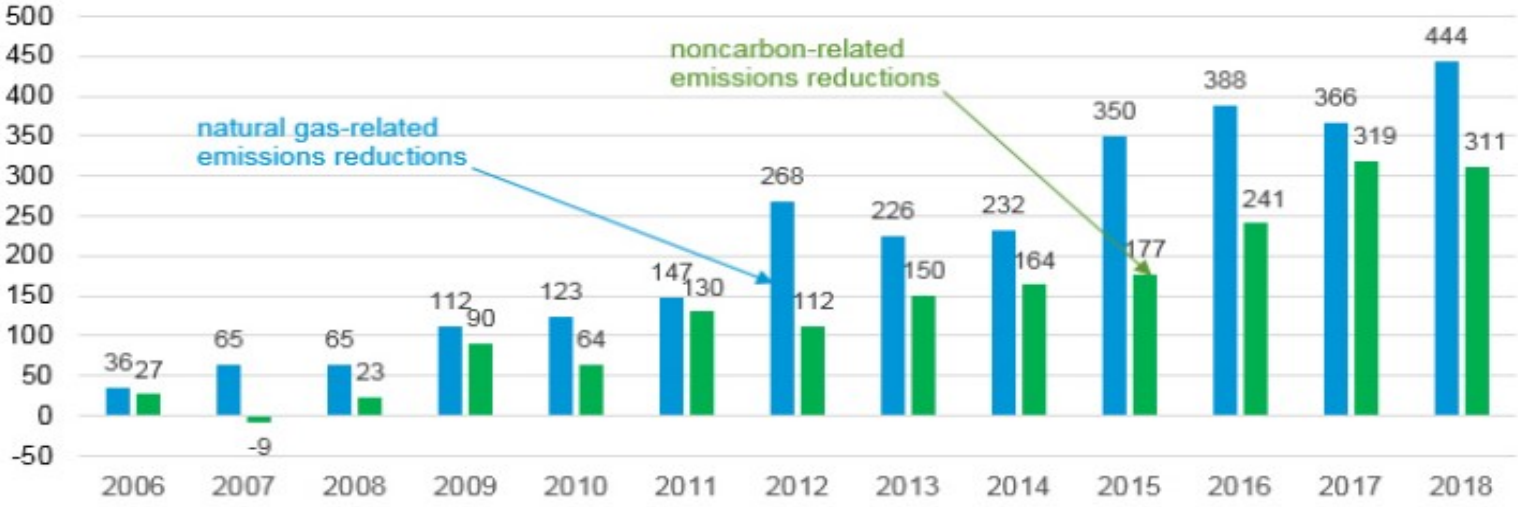
Who has made progress?



Who has made progress?

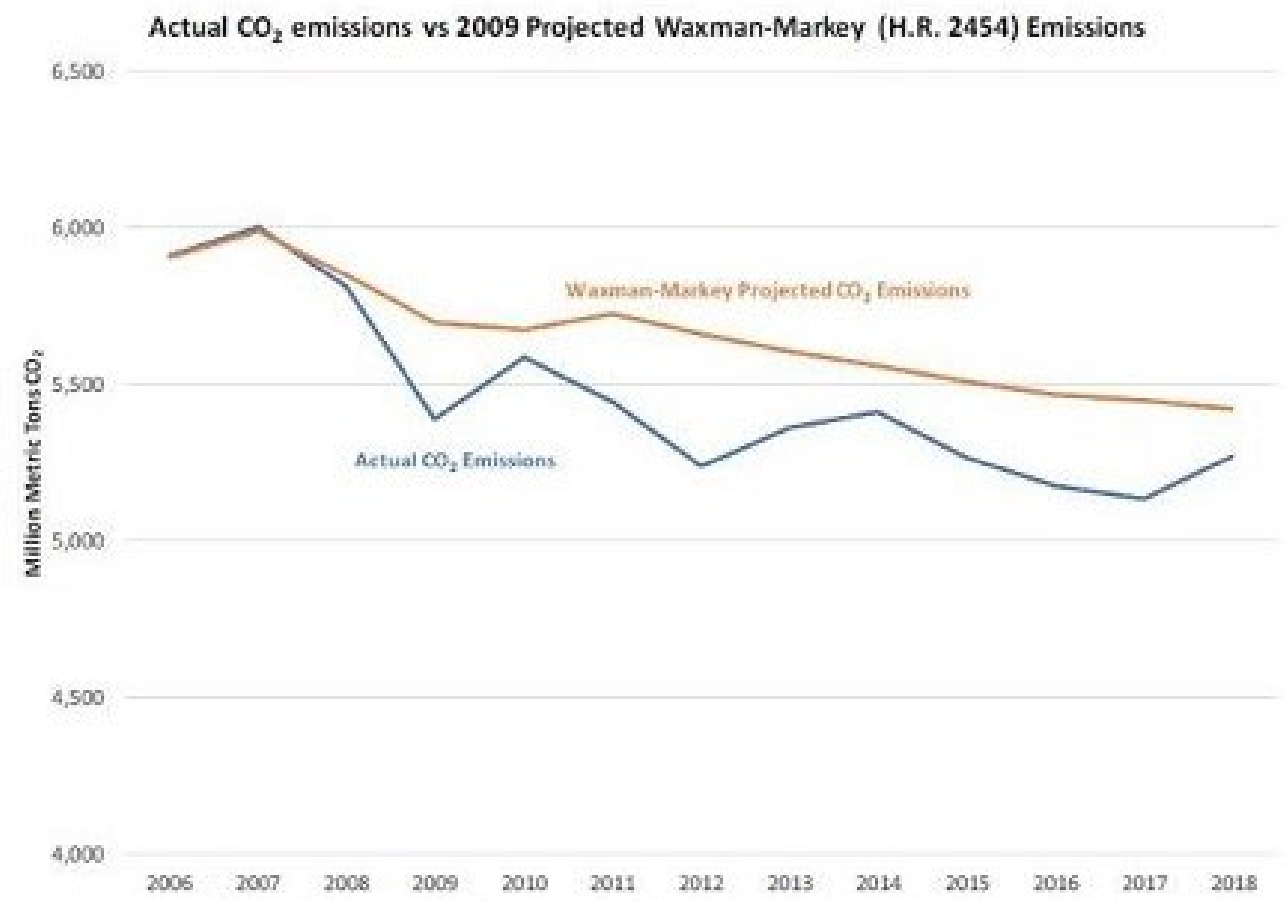
Figure 9. Electricity generation CO2 savings from changes in the fuel mix since 2005

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.

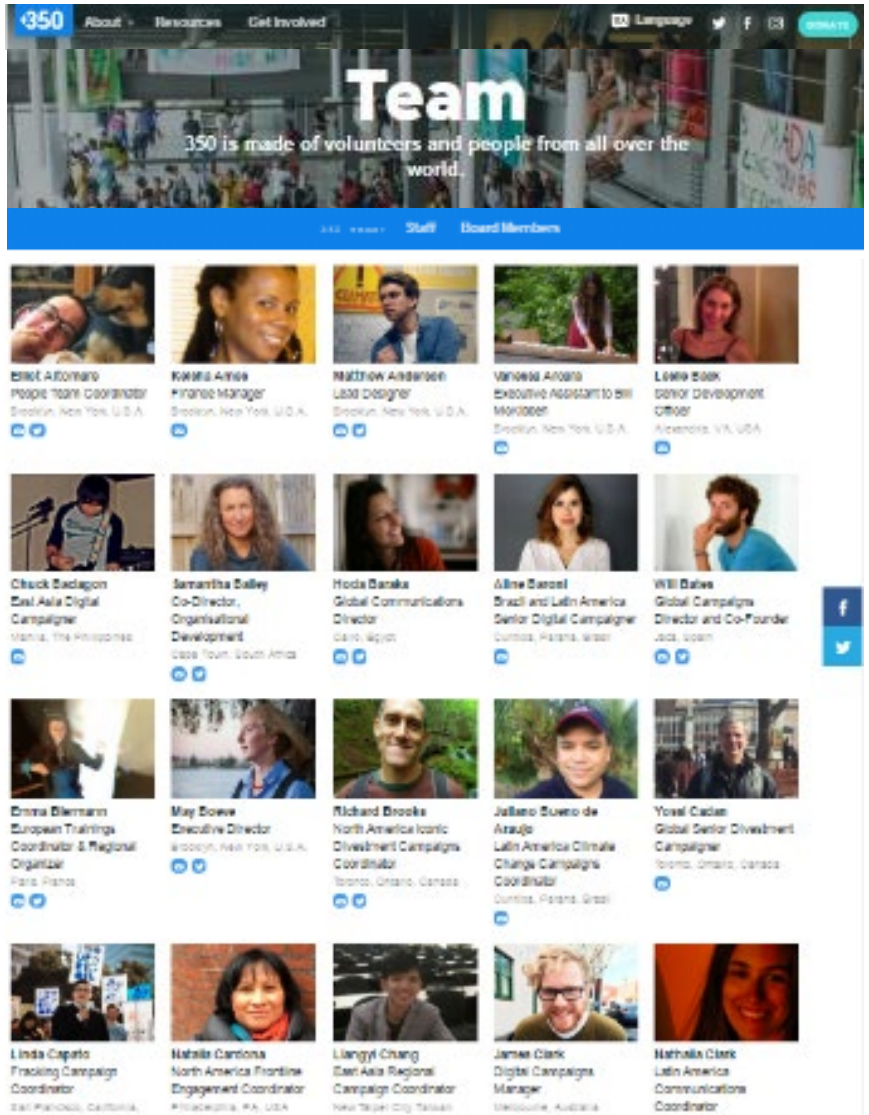
Where would we be if….



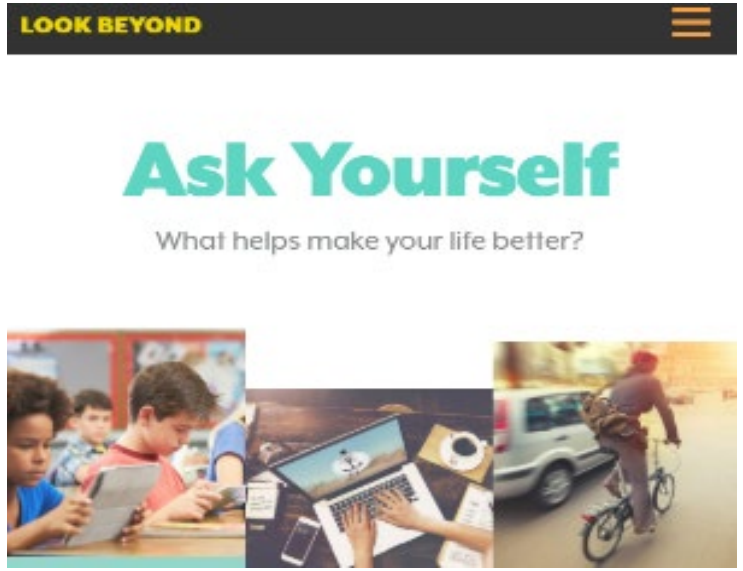
Source: EIA, Monthly Energy Review, May 29, 2009; EIA, Energy Market and Economic Impacts of H.R. 2454, the American Clean Energy and Security Act of 2009, August 4, 2009.

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.



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
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