

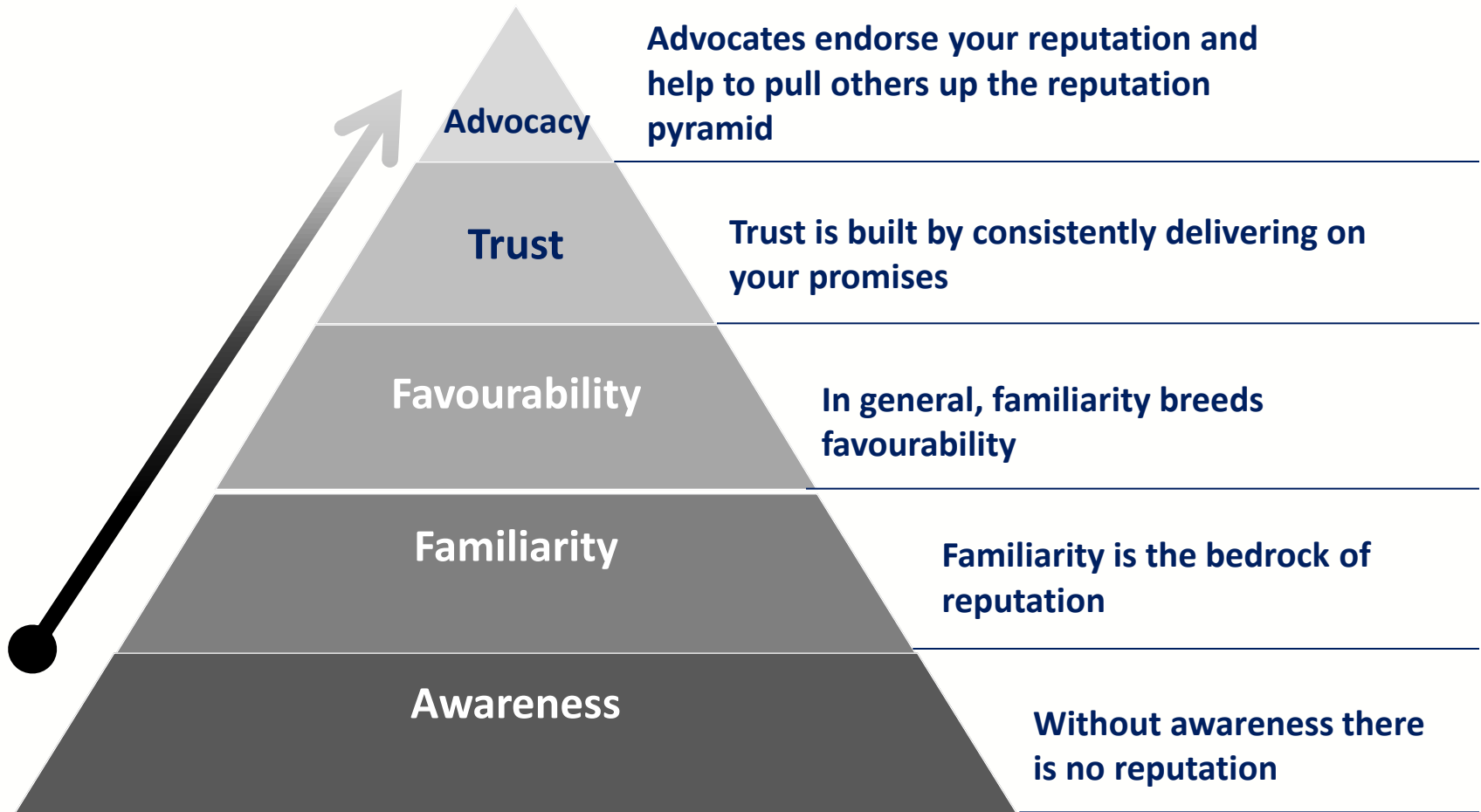
Public Confidence & Canada's Oil & Gas Industry

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Overview

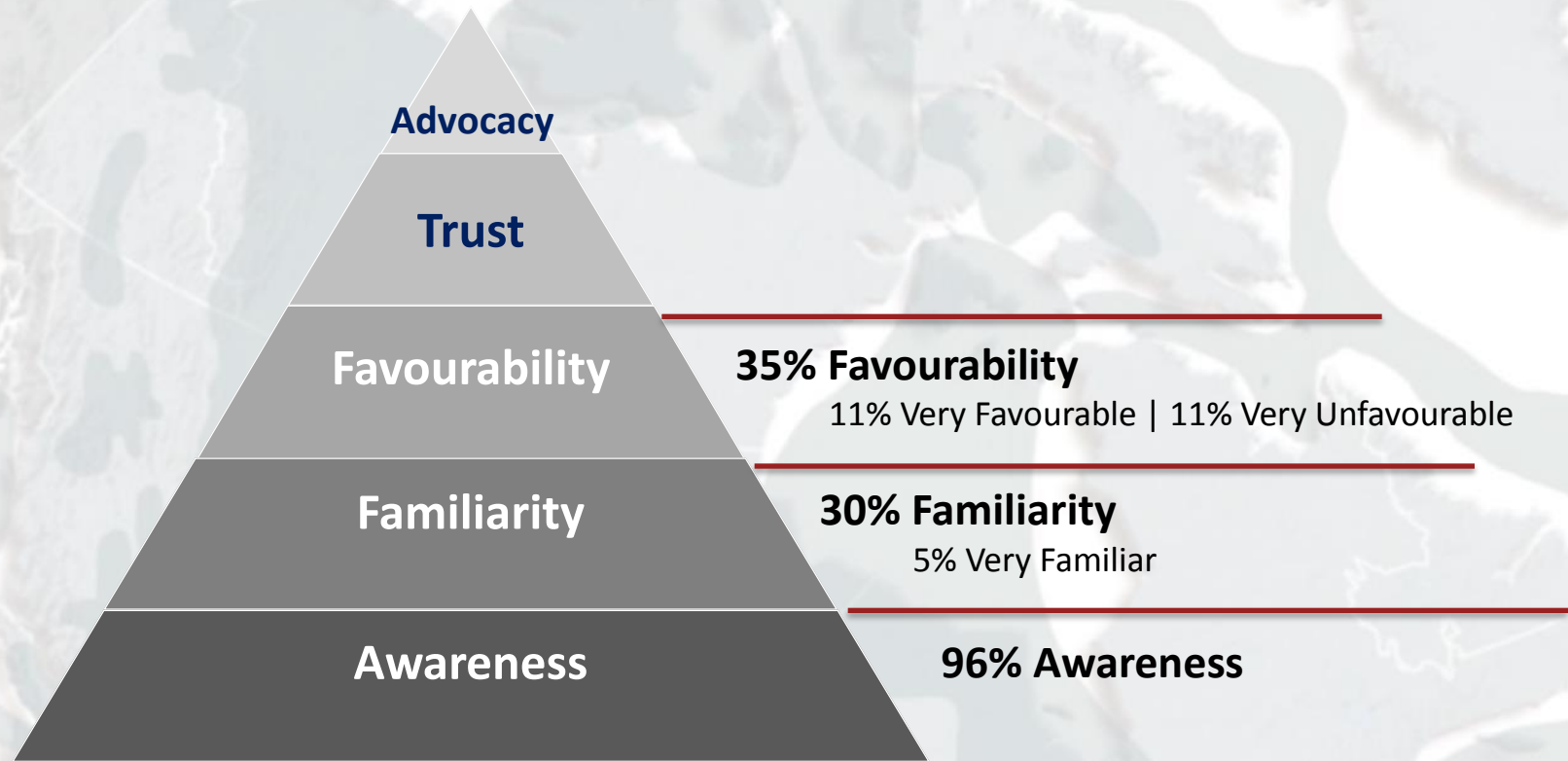
- **Public confidence is one of many requirements for the oil and gas industry's competitiveness and access to markets.**
- **Public confidence supports public policy – but is public policy based on a true assessment of public confidence?**
- **What is the current state of public confidence in Canada's oil and gas industry?**
- **What drives public confidence?**
- **Is the issue literacy – or trust?**
- **Implications for communications and public policy?**

Steps to Building a Strong Reputation



Pyramid of Trust courtesy of IPSOS REID

Current State of Public Confidence in the Oil Sands Industry in Canada



Drivers of Public Confidence

- **Sources**

- Public institutions
- Media
- Academics & industry experts
- Friends, families, neighbors

- **Pillars of Trust**

- Economic contribution
- Safety
- Environmental impact
- Industry character

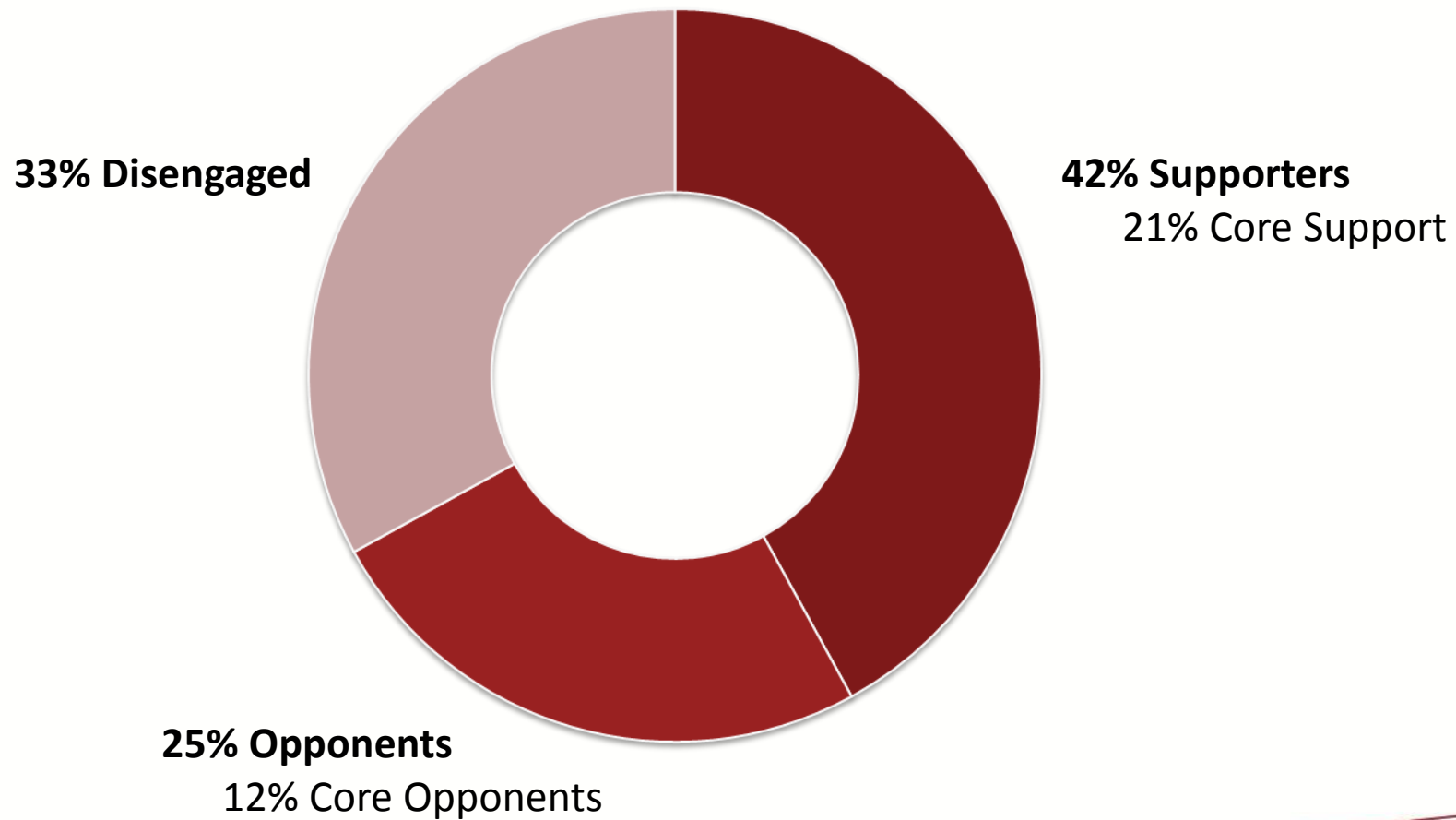


Industry Performance on Trust Pillars

- **Economics +52%**
 - Creating jobs for Canadians (+63%, -11%)
- **Safety +21%**
 - Operating safely in all the communities where they are active (+44%, -23%)
- **Environment +12%**
 - Working to lessen the impact (+41%, -29%)
- **Character +11%**
 - Behaving ethically (+41%, -26%)
 - Being responsive to concerns (+39%, -29%)
 - Being honest (+38%, -30%)

Opinion of Canadians

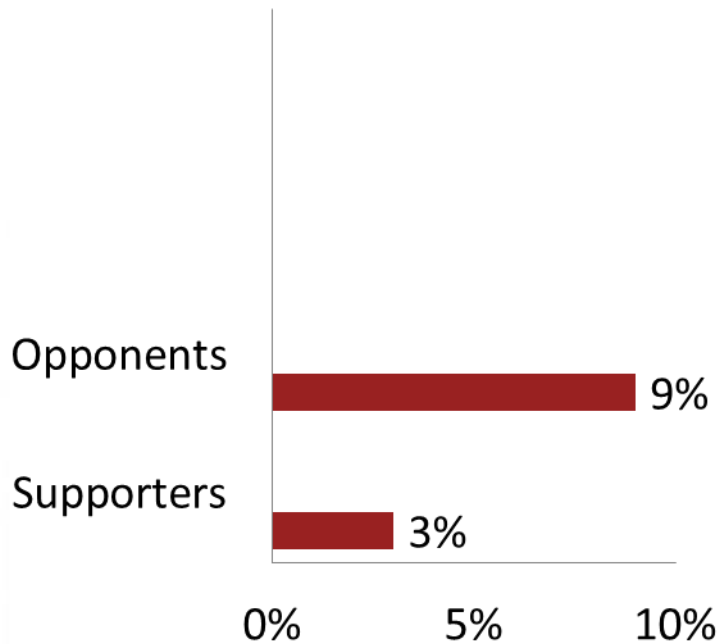
Canada maintains modest to strong support for oil and gas development.



Confidence vs Advocacy

**Most Canadians support
oil and gas development.**

So what is the issue?



The Challenge – Literacy vs Trust vs Advocacy

- **Canadians trust our industry the more they feel we align with their values.**
- **Opponents are 3x more likely to speak out against than supporters are likely to speak out in favor.**

Implications for communications & public policy

- **We must show Canadians how our performance aligns to their values – safety, economics, environment and industry character.**
- **We must encourage trustworthy, supportive voices to speak up where needed to boost public confidence.**
- **Risk for Canadians: public policy follows polarizing voices, not true public opinion in the community.**

Reflections

- Is energy literacy a necessary condition of public confidence?
- Will increased energy literacy lead to a different outcome?
- Who needs energy literacy – the public or government?
- Is energy literacy is a rational solution to an irrational problem?
- Is public confidence based on literacy – or on trust?