



# How can oil and gas fuel tomorrow as well as today?

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2018 IAGC Annual Conference

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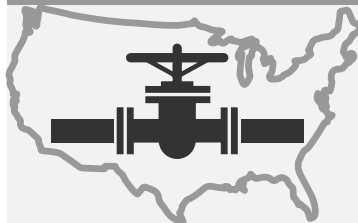
# Why does perception matter?

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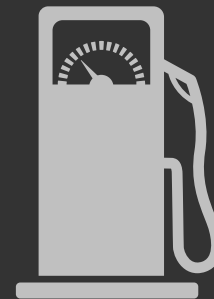
Future of  
work



Future of  
operations

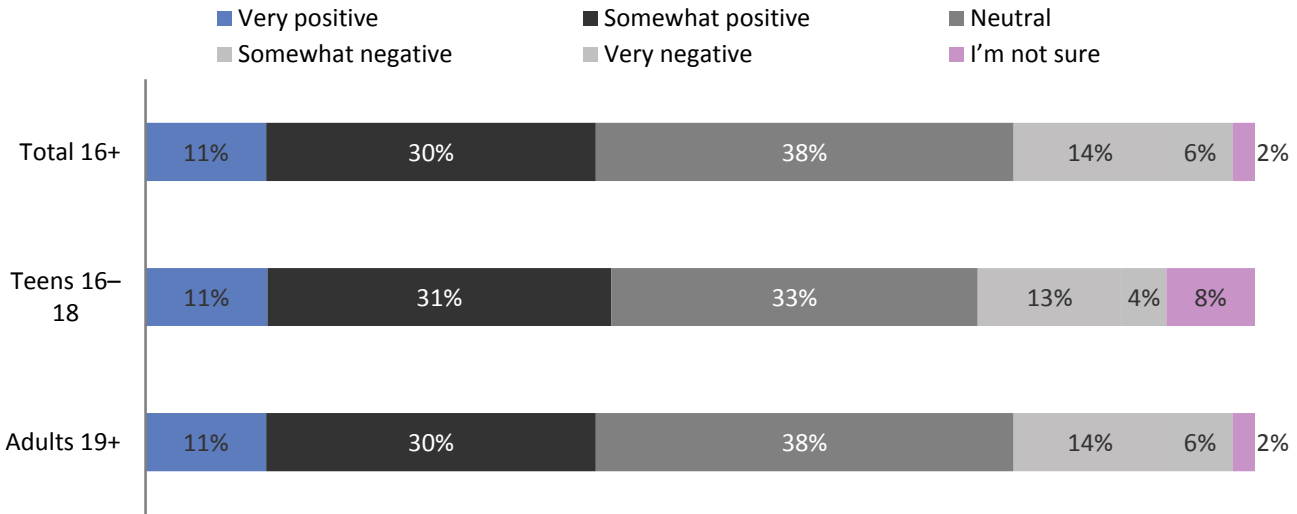


Future of  
demand



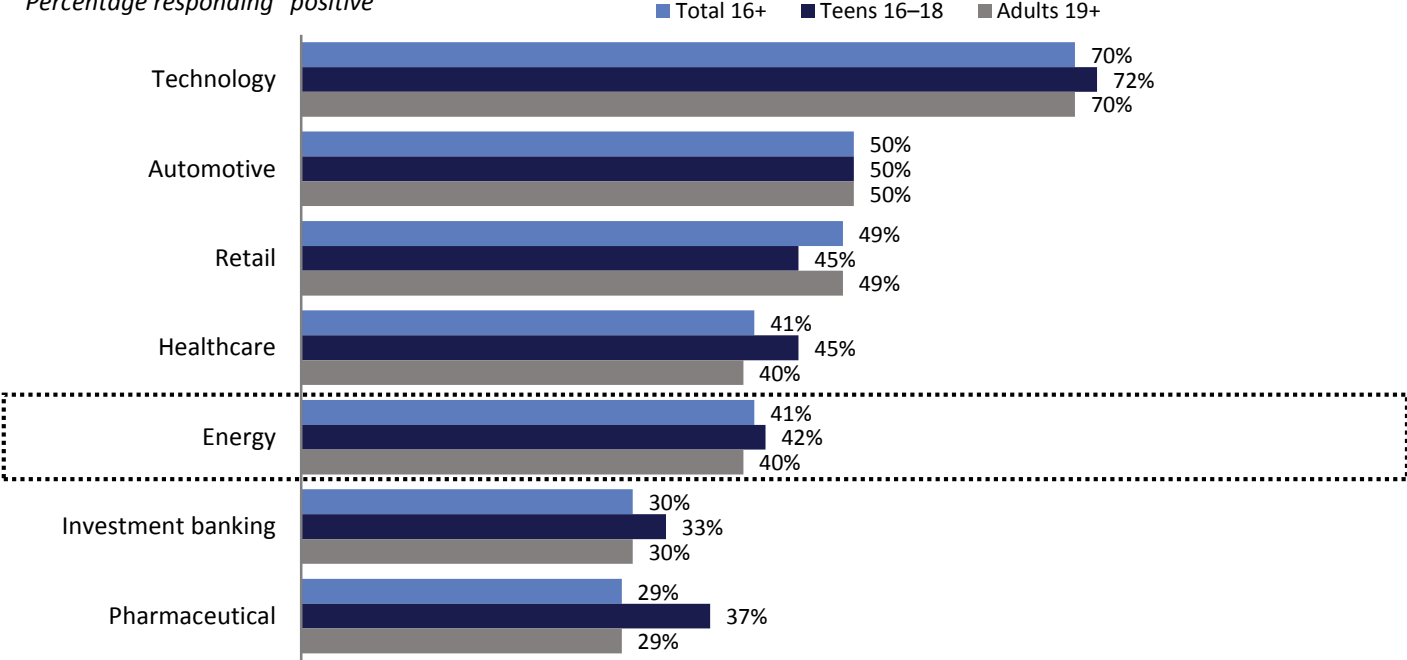
# Perceptions of the energy industry

- Consumers with a positive perception of the energy industry outnumber those with a negative perception by two to one.



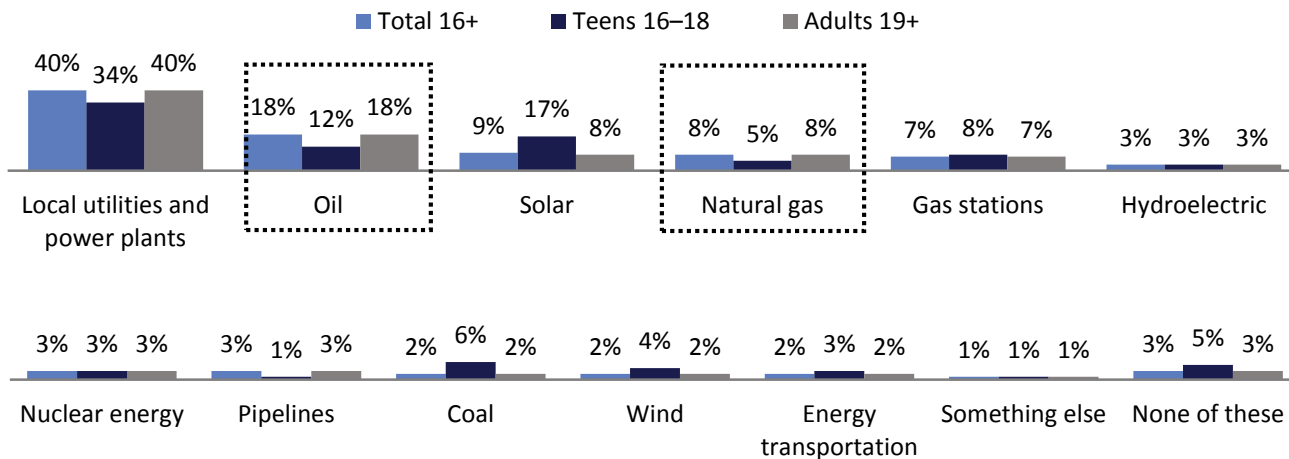
# Energy perceptions compared with other industries

Percentage responding "positive"



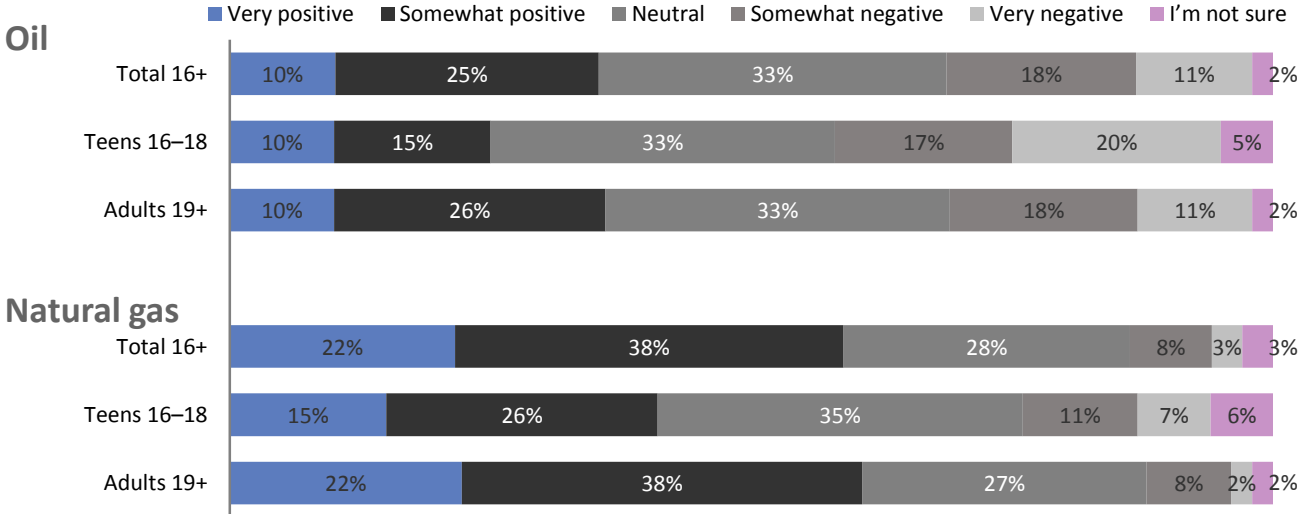
# Energy sector thought of first

- Infrastructure generally, and local utilities specifically, are the face of the energy industry. Among fuel sources, oil has a greater share of mind than natural gas.



# Oil and gas perceptions

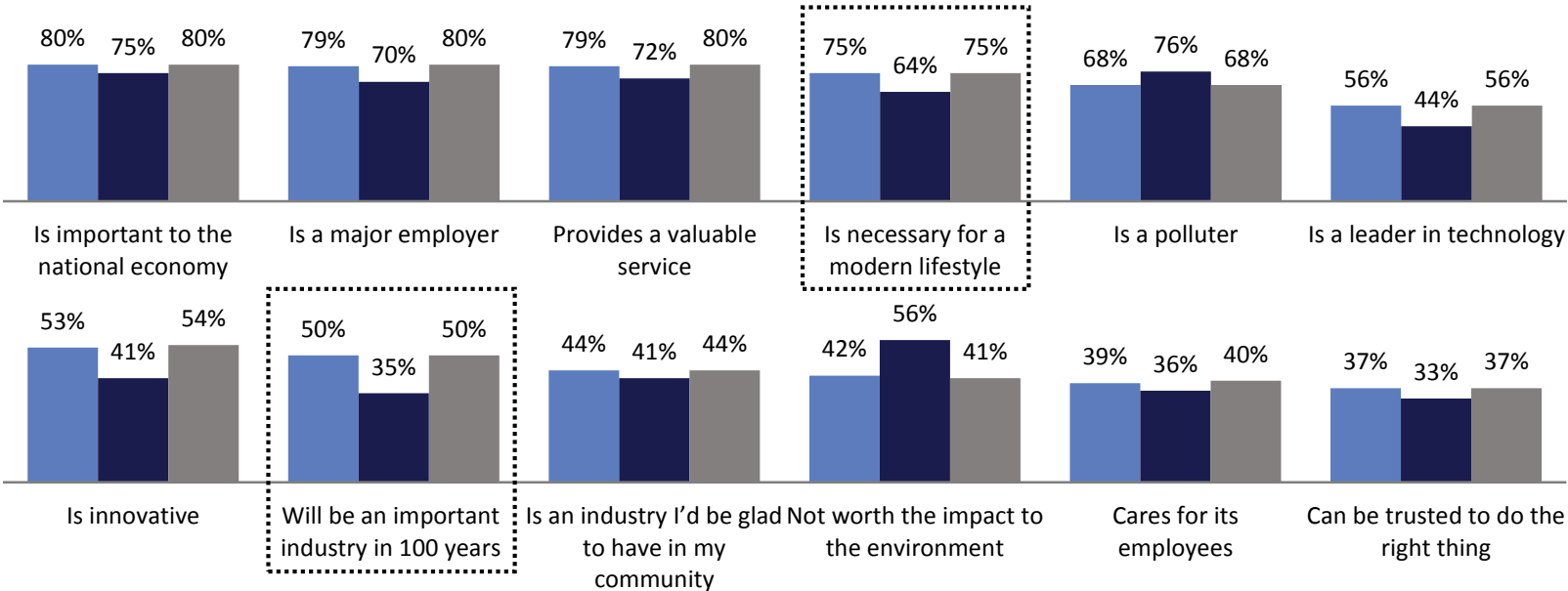
- Oil has the greater share of mind, but natural gas has a more positive reputation.



# Oil and gas industry attributes

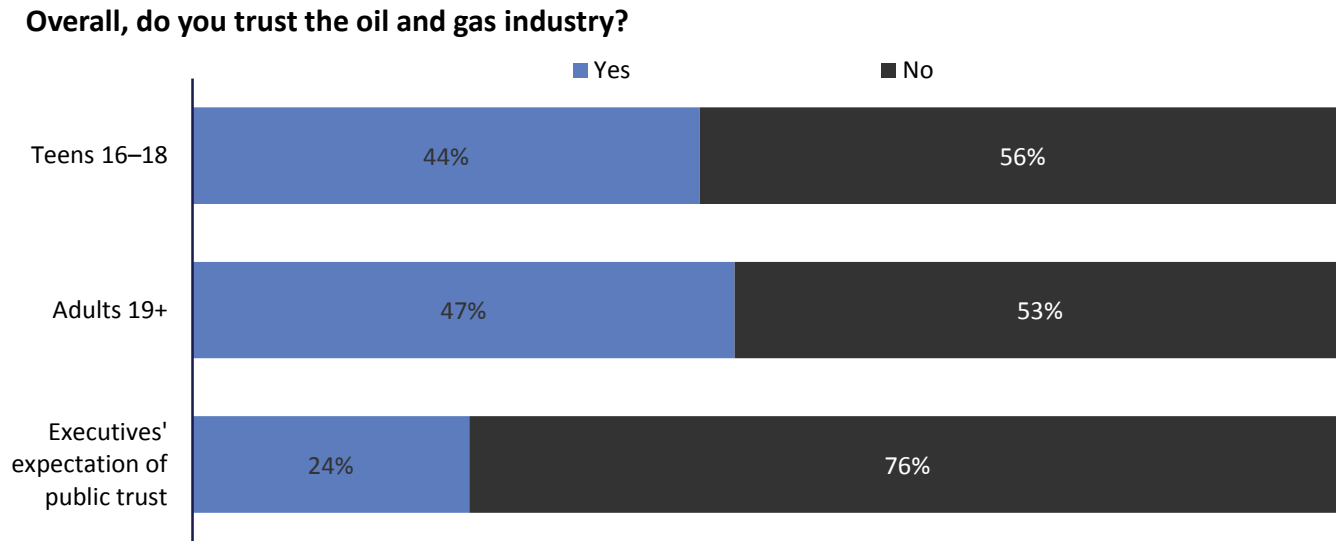
Showing % saying agree

■ Total 16+ ■ Teens 16–18 ■ Adults 19+



# Trust in the oil and gas industry

- Executives underestimate the degree of trust the public places in the industry.

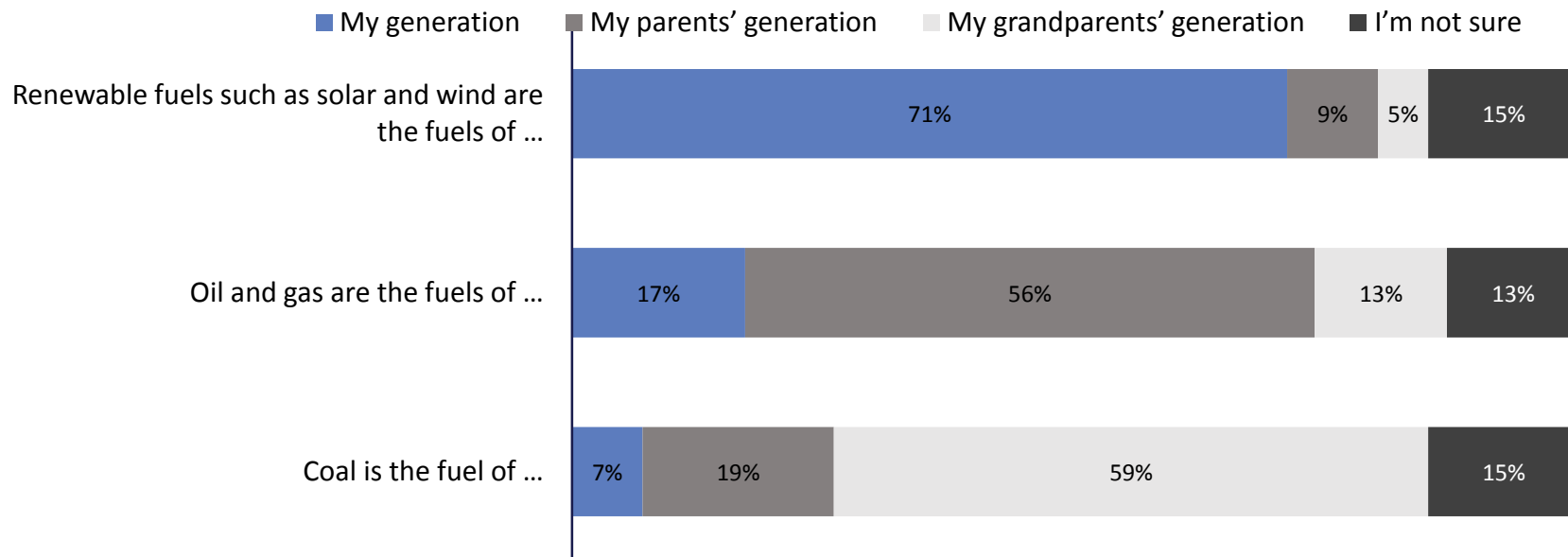




# Fuels of a generation

## Which fuel belongs to which generation?

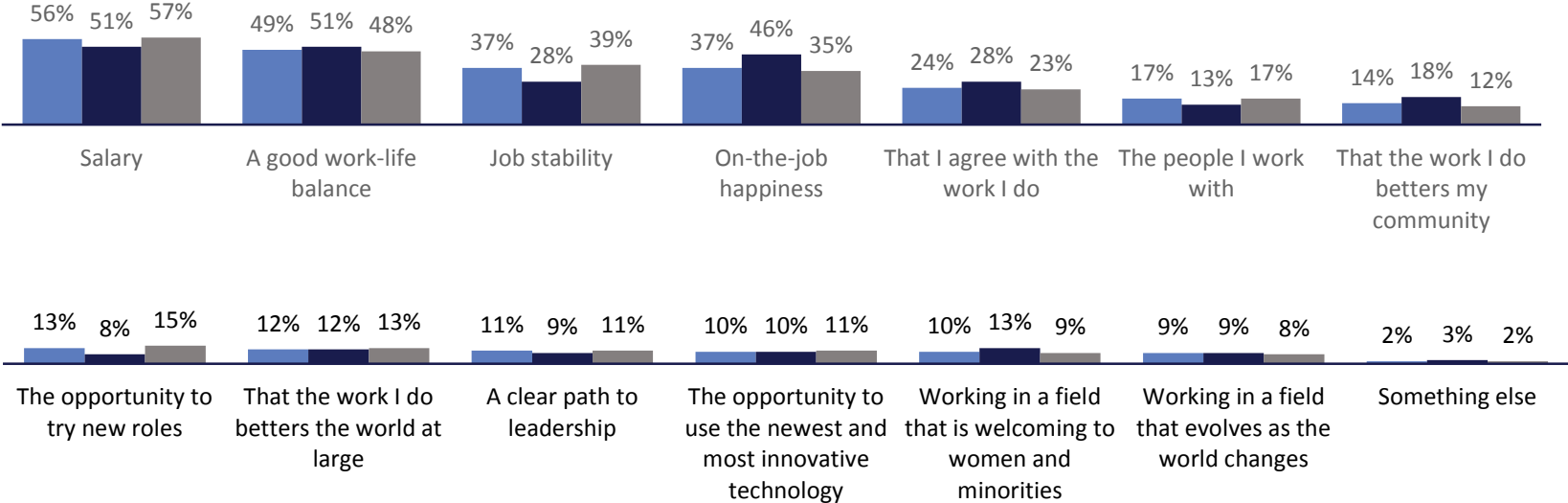
*Question directed to teens aged 16–18*



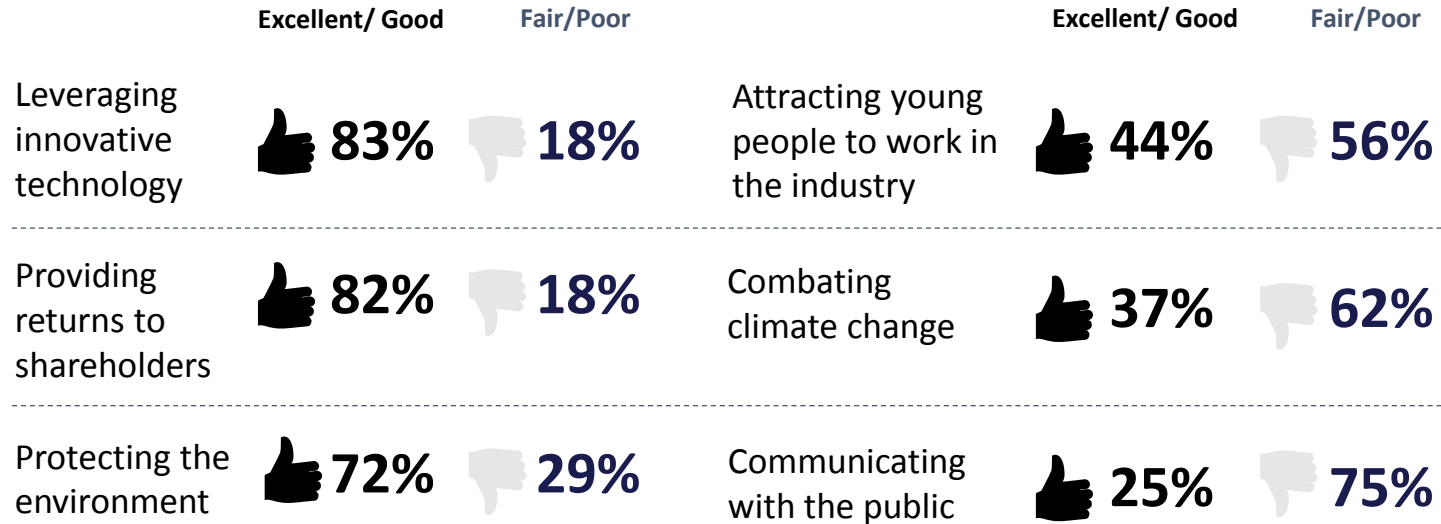
# Most important career considerations

Asked of respondents 16–21 or 22–35 and *career path not set*

■ Total 16+ ■ Teens 16-18 ■ Adults 19-35



# Industry views on employment strengths, weaknesses

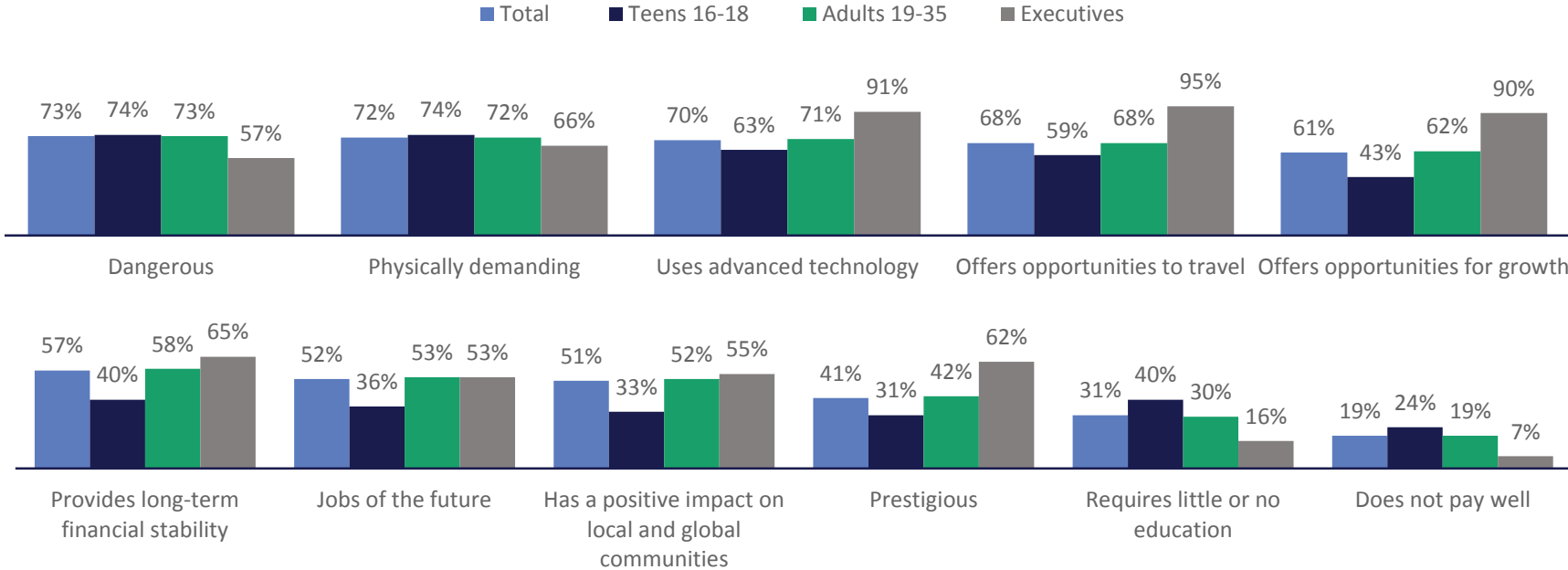


## 81% of executives

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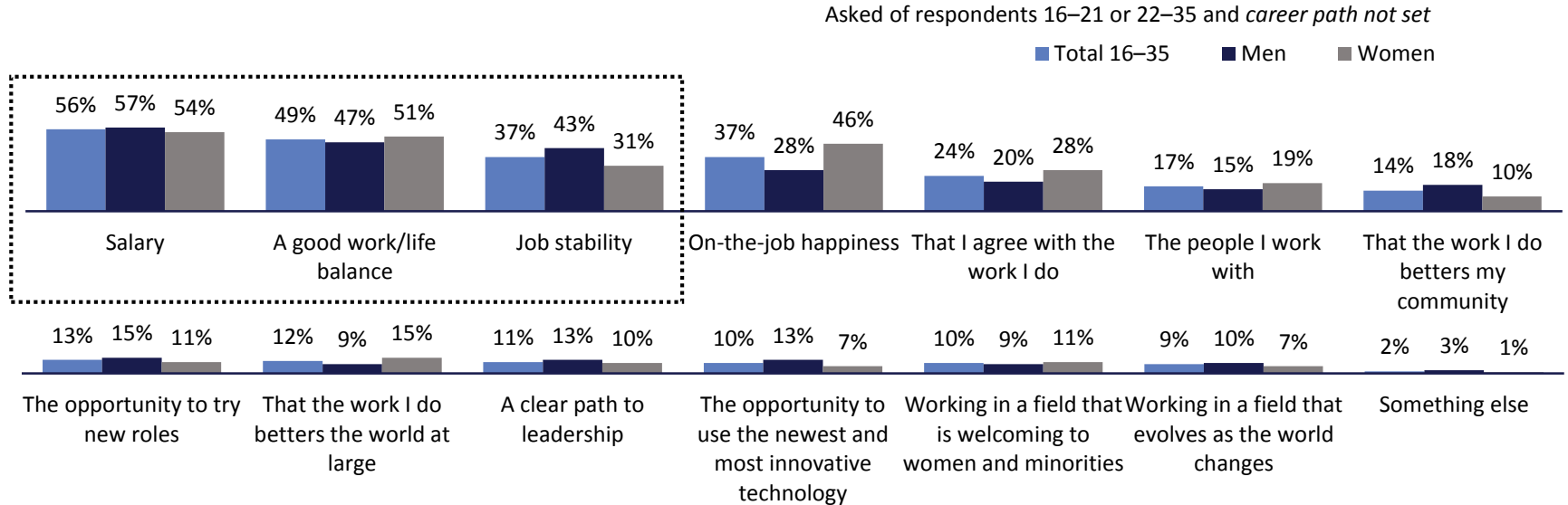
agree the industry will need to develop an educated, highly skilled workforce over the next ten years, in contrast to a mass workforce.

# Describing the typical oil and gas job



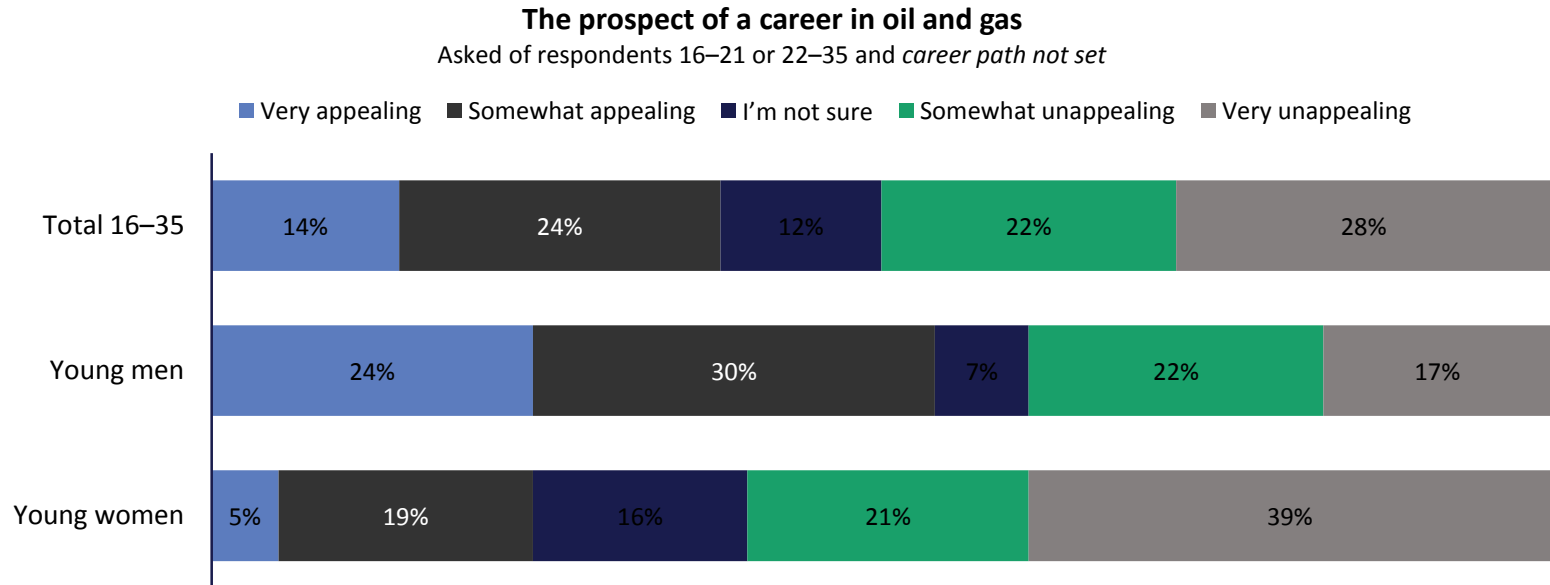
# Career considerations: gender differences

- Stability is more important to young men, while young women place a greater emphasis on on-the-job happiness.

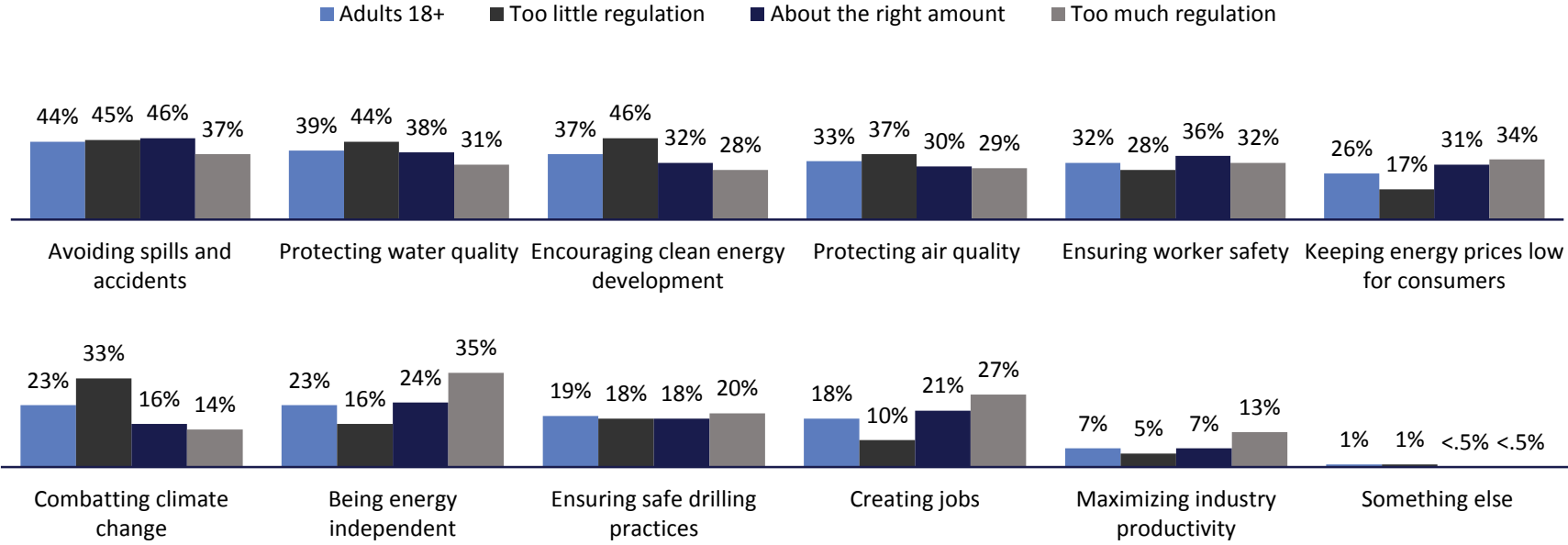


# Appeal of oil and gas careers: gender differences

The degree to which young women find oil and gas careers unappealing drives net appeal among all young people below zero.



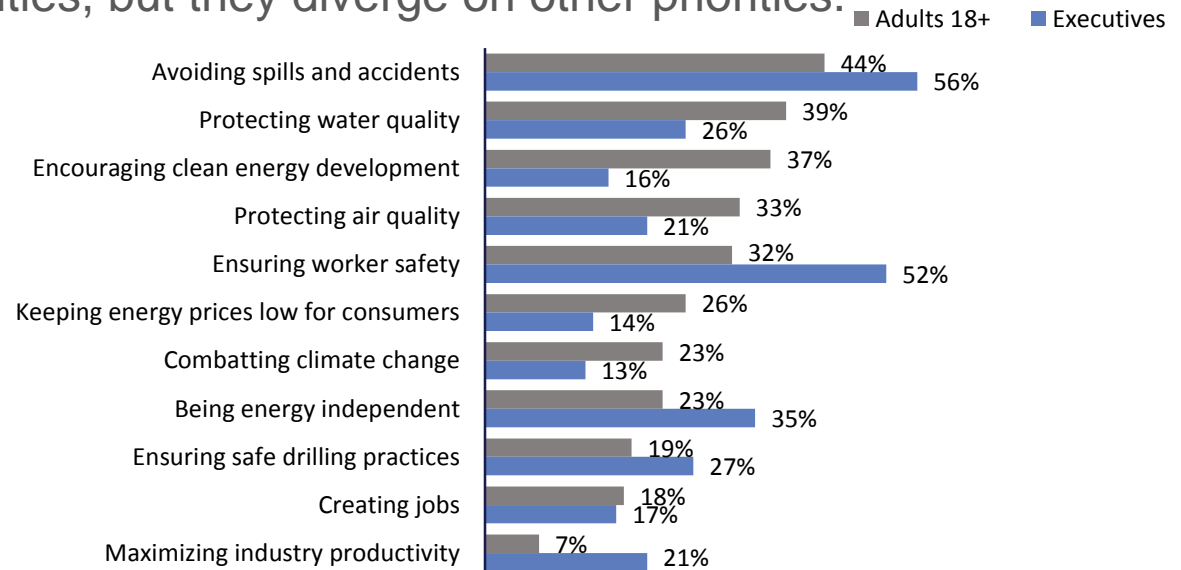
# Top three regulatory priorities





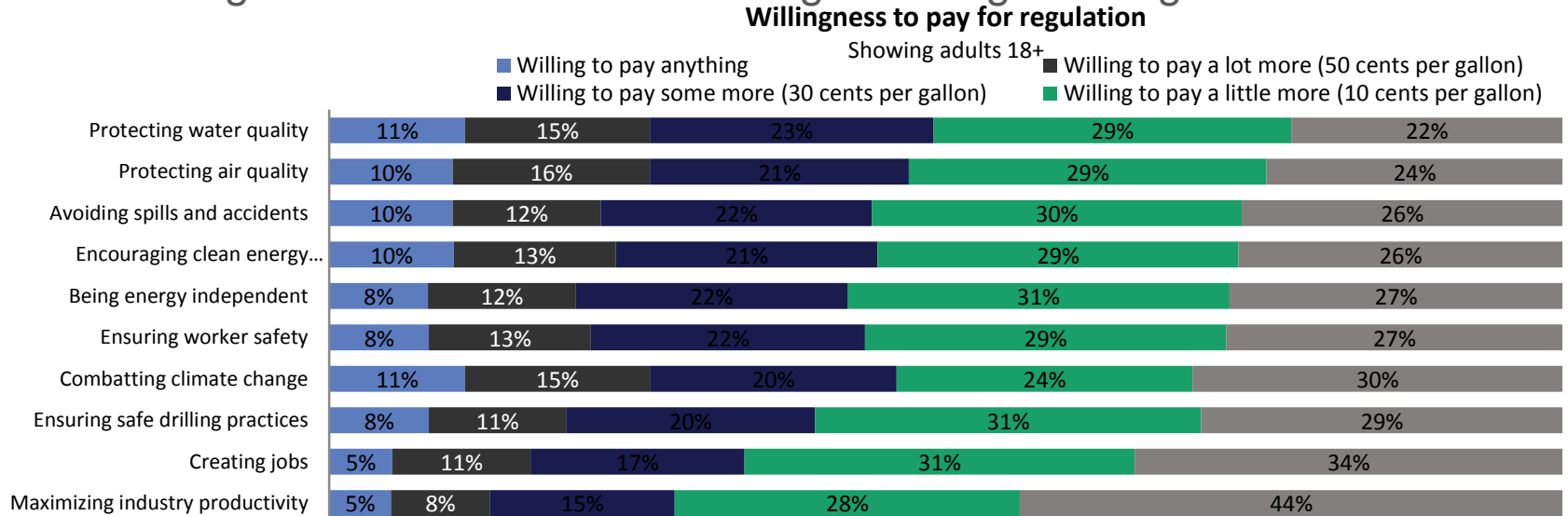
# Top three regulatory priorities

- Both consumers and executives have “avoiding spills” at the top of their lists of regulatory priorities, but they diverge on other priorities.



# How much will you pay for regulations achieving these goals?

- A majority of Americans are willing to pay to achieve regulatory objectives, undermining cost to consumers as an argument against regulation.



# US oil and gas perception survey

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