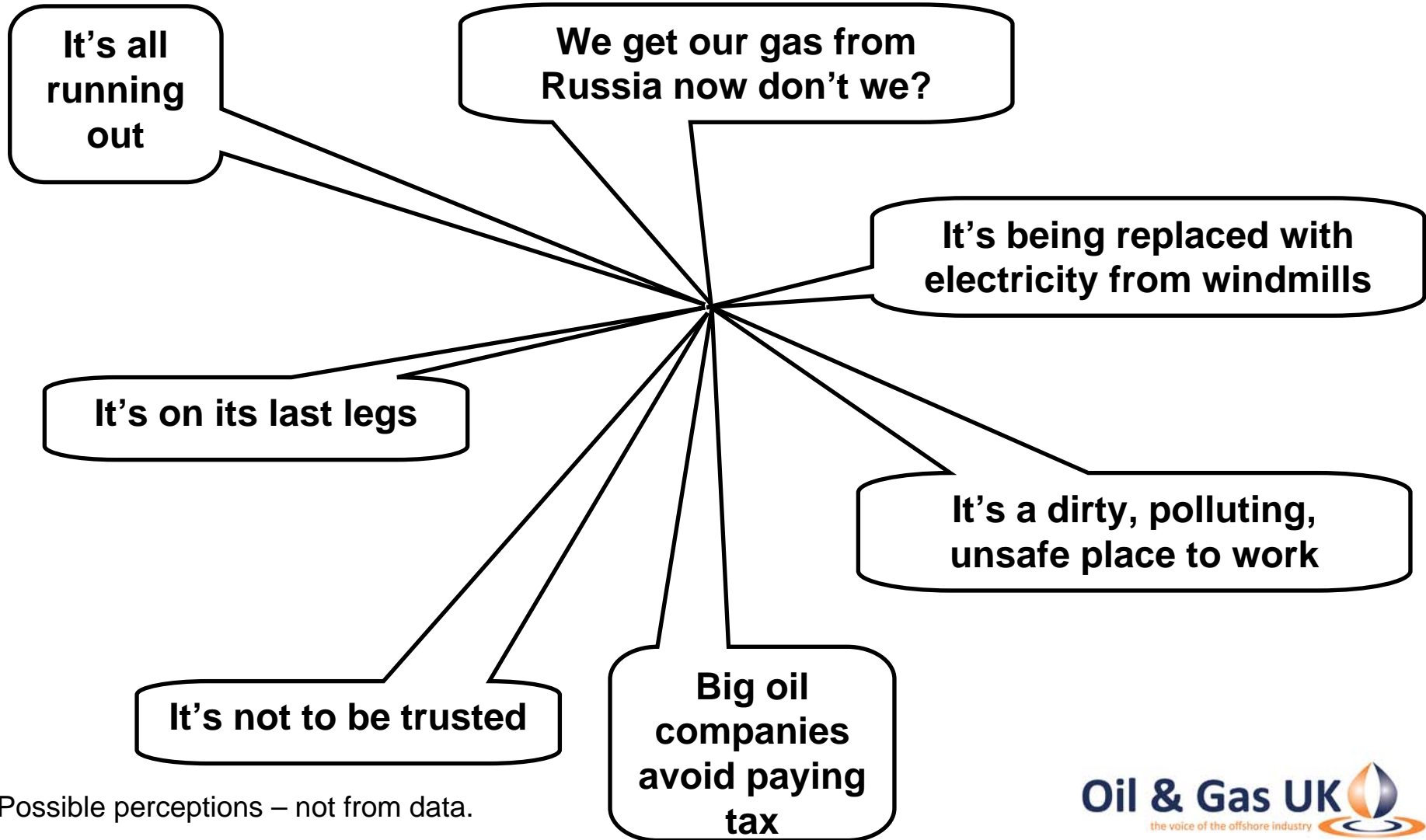


Oil and Gas - The Dangers of Being Britain's Best Kept Secret

Malcolm Webb
CEO
Oil & Gas UK



Perceptions of current views?



Possible perceptions – not from data.

The dangers of ignorance

- Apathy can lead to antipathy
- Turning off talent
- Poor politics
- Wrong policy
- Awful irreversible outcomes

Oil & Gas UK Survey



- Conducted by Ipsos MORI.
- 500 adults aged 16 years and over.
- 250 in Greater London, and 250 in Aberdeenshire.
- Fieldwork conducted 22nd to 31st December 2010
- Computer Assisted Telephone Interviews
- Quota sample of adults with quotas set within each area on gender, age, and working status.
- Data weighted to the known population profile

- Results just received and still being reviewed but it seems that

The public tends to underestimate the importance of UK oil and gas production

- 71% of Londoners thought the UK gets the majority of its needs for oil wholly or mainly from abroad
- 35% of the Aberdonians thought likewise.
- 43% of Londoners thought the UK gets the majority of its needs for gas wholly or mainly from abroad
- 33% of Aberdonians thought likewise.

Q1 - In your opinion, from where does the UK get the majority of its needs for oil and gas?

Base: 250 adults in Aberdeenshire and 250 in Greater London, aged 16+ years.
Fieldwork 22nd December to 31st December 2010

As for views on the current contribution of oil and gas to national energy supply

- 14% thought the contribution is up to 40%
- 27% thought it was between 41% and 60%
- 34% said it was between 61% and 80%
- 17% said it was more than 80%
- 8% said they didn't know.

Q2 – As far as you know, approximately what percentage of the UK's overall energy needs are met by oil and gas?

Base: 250 adults in Aberdeenshire and 250 in Greater London, aged 16+ years.
Fieldwork 22nd December to 31st December 2010

.... and the public tends to overestimate the reduction which will be achieved in ten years time

- 28% thought the oil and gas contribution would then be 40% or below
- 30% thought it would then be between 41 and 60%
- 26% believe it will be between 61 and 80%
- 10% thought it would be between 81 and 100%
- 7% said they didn't know

Q3 – Thinking about the UK's energy needs in the year 2020, approximately what percentage of the UK's overall energy needs do you think will be met by oil and gas?

Base: 250 adults in Aberdeenshire and 250 in Greater London, aged 16+ years.
Fieldwork 22nd December to 31st December 2010

As for impressions about our Industry.....



The respondents rating our industry “mainly favourable” or “very favourable” on the following four issues was as follows:

	Total (%)	Aberdeenshire (%)	London (%)
Protecting the environment	47%	53%	40%
Paying tax to UK government	47%	47%	48%
Providing jobs	71%	81%	61%
Securing UK energy supplies	57%	64%	50%

Q4 – How favourable or unfavourable are your opinions and impressions on the UK’s oil and gas industry for each of the following: protecting the environment; paying tax to the UK government; providing jobs; and securing UK energy supply.

Base: 250 adults in Aberdeenshire and 250 in Greater London, aged 16+ years.
Fieldwork 22nd December to 31st December 2010

And on the other hand.....



Those rating us “mainly unfavourable” or “very unfavourable” on those four topics were as follows:

	Total (%)	Aberdeenshire (%)	London (%)
Protecting the environment	33%	25%	40%
Paying tax to UK government	24%	24%	23%
Providing jobs	10%	6%	14%
Securing UK energy supplies	15%	15%	18%

Q4 – How favourable or unfavourable are your opinions and impressions on the UK’s oil and gas industry for each of the following: protecting the environment; paying tax to the UK government; providing jobs; and securing UK energy supply.

Base: 250 adults in Aberdeenshire and 250 in Greater London, aged 16+ years.
Fieldwork 22nd December to 31st December 2010

Whilst some expressed no clear opinion



	Total (Aberdeenshire and London combined)	
	Neutral (neither favourable or unfavourable) (%)	Don't know (%)
Protecting the environment	15%	6%
Paying tax to UK government	16%	14%
Providing jobs	12%	7%
Securing UK energy supplies	19%	9%

Q4 – How favourable or unfavourable are your opinions and impressions on the UK's oil and gas industry for each of the following: protecting the environment; paying tax to the UK government; providing jobs; and securing UK energy supply.

Base: 250 adults in Aberdeenshire and 250 in Greater London, aged 16+ years.
Fieldwork 22nd December to 31st December 2010

And finally we are not necessarily wholly unloved!

Thinking about the protection of the environment, payment of taxes to UK government, provision of jobs and the securing of energy supplies.....

- 60% of all respondents regarded our industry overall “mainly favourable” or “very favourable”
- 21% regarded the industry “neither favourable nor unfavourable”
- 15% regarded the industry “mainly unfavourable” or “very unfavourable”
- 4% didn’t know

Q5 – and thinking about protection of the environment, payment of taxes to UK government, provision of jobs and the securing of UK energy supplies, how favourable or unfavourable do you rate the UK oil and gas industry overall?

Base: 250 adults in Aberdeenshire and 250 in Greater London, aged 16+ years. Fieldwork 22nd December to 31st December 2010





Working to:

- Maximise the recovery of the UK's Oil and gas reserves
- Promote the long term sustainable future on the UK oil and gas industry supply chain
- Raise public awareness of the of the UK oil and gas industry.



