



ExxonMobil Chemical Fife Ethylene Plant, Community Attitudes Research 2019

Presentation of results by Mark Diffley Consultancy and Research to Liaison Committee

March 2019



Background and Methodology

A face-to-face survey of 200 residents was carried out within the following communities surrounding the ExxonMobil Chemical Fife Ethylene Plant: Crossgates, Hill of Beath, Cowdenbeath, Lumphinnans, Lochgelly, Cardenden, Auchtertool, Burntisland, Aberdour and Dalgety Bay.

The achieved sample is representative of the Fife population, with quota sampling on location, sex, age, and working status. The survey was carried out between the 12th November – 7th December 2018.

Throughout, results are shown as %, and demographic variations are commented upon only where we are sure these are statistically significant i.e. where we can be 95% certain that they have not occurred by chance.

A complementary strand of qualitative research was also carried out with 18 “key opinion formers”, involving in-depth interviewing with community councillors, politicians, media representatives, and public bodies. The qualitative research was designed to explore the range of different views regarding ExxonMobil rather the prevalence of particular views. The interviews were carried out by telephone between the 10th of December – 7th February 2019.

Key Messages



Overall favourable perceptions among opinion formers and residents – both view ExxonMobil as a significant employer in the local area and value the economic contribution made by the company

Residents

1. High levels of knowledge about ExxonMobil Apprenticeship scheme, which is key given jobs important in judging a company
2. ExxonMobil is regarded as a good neighbour across a number of measures, increase since 2014
3. Lower levels of awareness regarding flaring – among those who are concerned environmental pollution is a worry

Opinion Formers

1. High levels of awareness of ExxonMobil CSR, particularly charity donations and engagement with schools
2. Desire for more proactive communications from ExxonMobil to target concerned residents
3. Also want more action to be taken operationally to minimise unplanned flaring and to benchmark flaring incidents

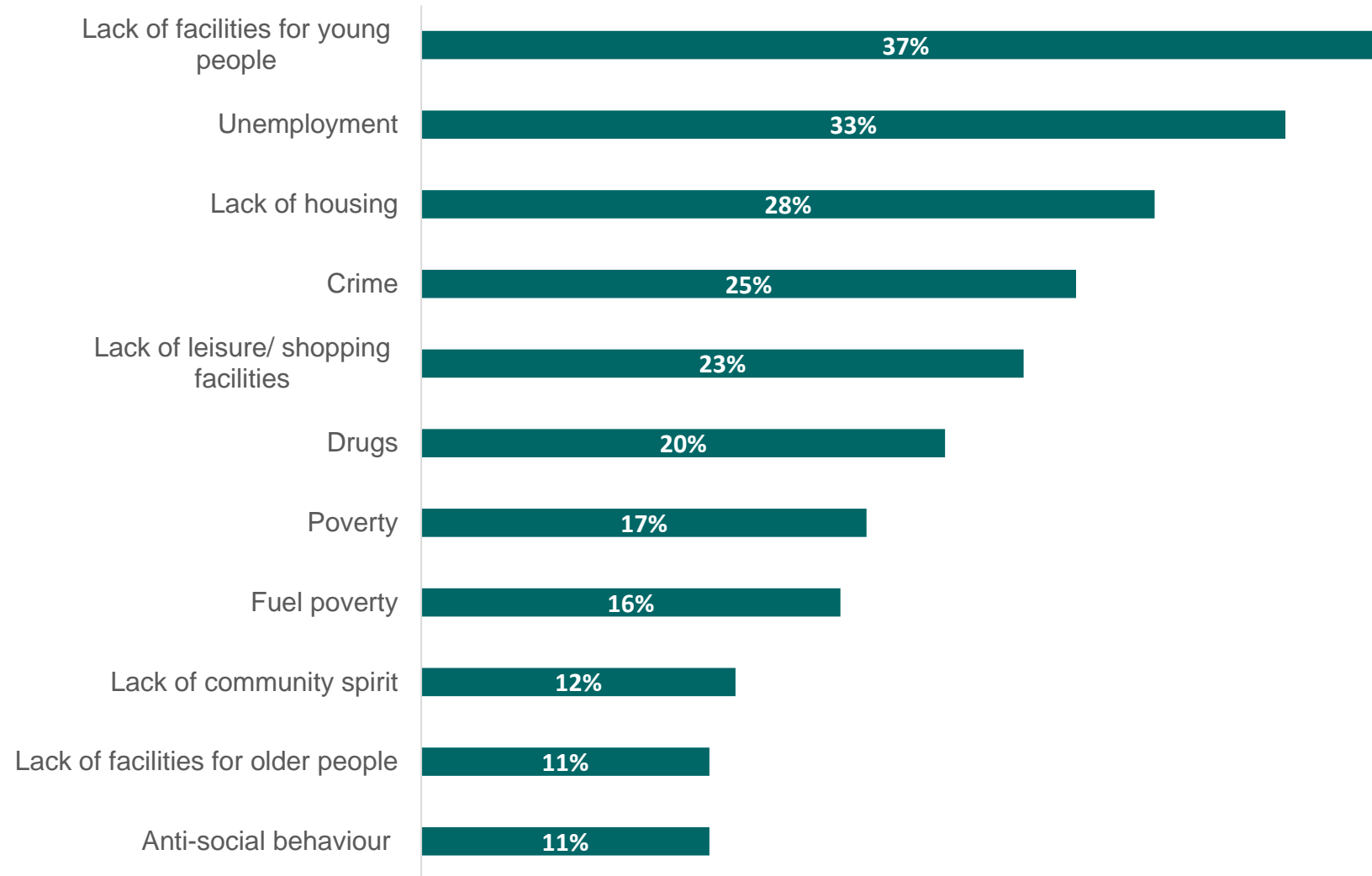
Local Context



Top three issues: lack of facilities for young, unemployment, lack of housing – broadly consistent with 2014

Q. Firstly, thinking about social and community issues, which two or three of these do you think are the most important issues facing your local area?

Top mentions



Base: All respondents

Socio-economic issues were prominent for opinion formers

Q. Thinking about the local area, what do you think are the two or three most pertinent issues affecting the community?

Reflecting residents survey, unemployment, poverty, a lack of opportunities for young people, and anti-social behaviour were the top issues for stakeholders

No spontaneous mention of oil and gas companies among the key issues affecting the local area

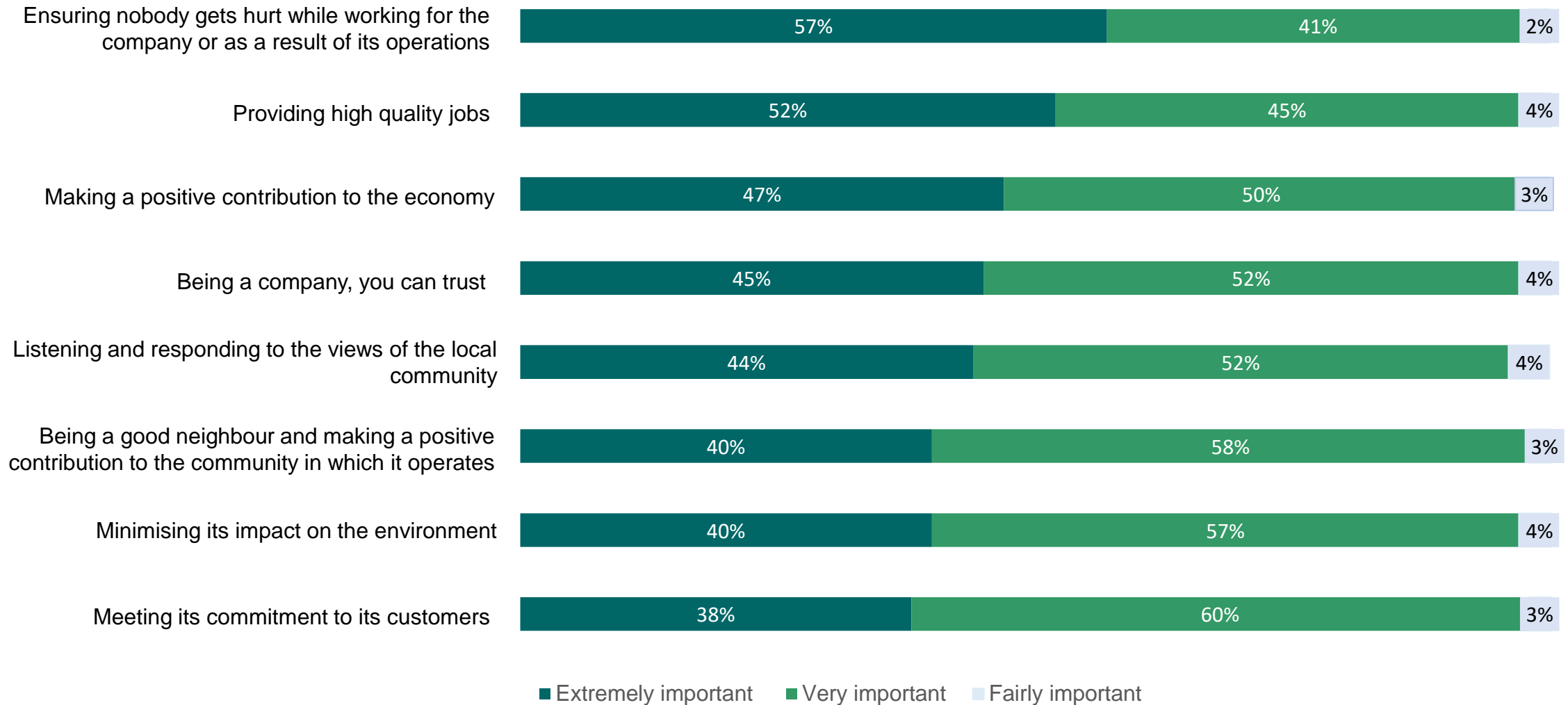
Among those who did mention Mossmorran, there was a view that the companies had been in the area for a long time, so were not seen as prominent challenges/issues

Reputation metrics



Residents attach a high level of importance to all of the following metrics by which to judge a company

I would like you to think now about chemical companies in general. I am going to read out things that some people think are important for a chemical company to do. How important is each one to you personally in your judgement of such a company?



Base: All respondents

Perceptions of the oil/gas/petrochemical industry

Importance for local economy; the chemical sector is adding value to the Scottish economy – have 30% more employees than other companies of similar size in other sectors

PR Challenge – public perception “*dirty and political industry*” – there is attention to the environmental impacts of the petrochemical sector, and feels that the sector is isolated in this respect

Modernisation and updating outdated equipment is seen to be key – view that ExxonMobil can work more with local partners to modernise and deliver benefits to local area e.g. SE and in terms of Developing Young Workforce

There is a relationship between familiarity and favourability

Familiarity v. Favourability

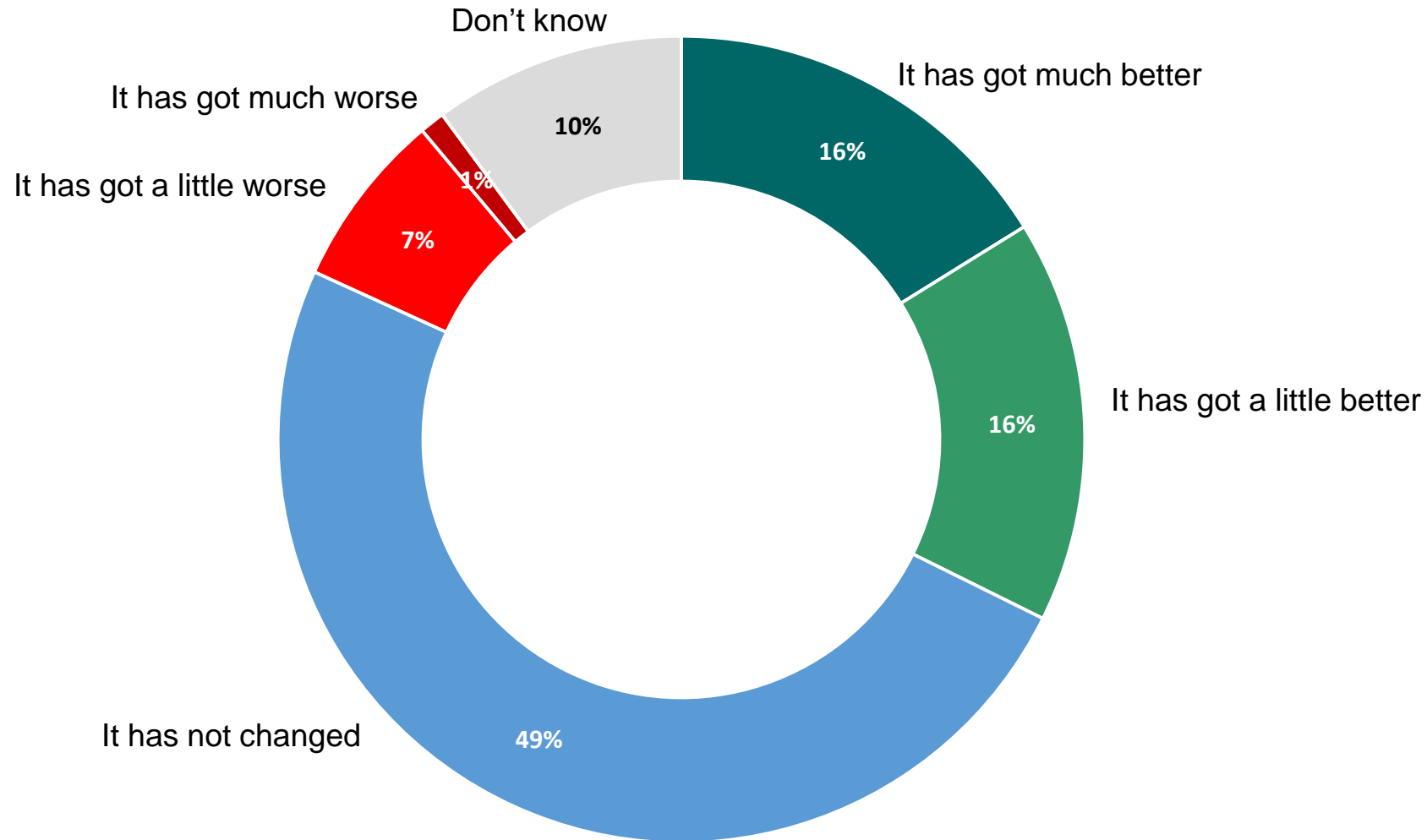
- 80% of those who know ExxonMobil very well/ a fair amount have a favourable opinion of the company
- Those who are unfamiliar with ExxonMobil are more likely to give a neither/no opinion response as opposed to an unfavourable opinion

	Favourable %	Neither %	Unfavourable %	No opinion %
Know very well/a fair amount	80%	5%	13%	2%
Know just a little/nothing about	43%	30%	11%	17%
Never heard of	0%	14%	0%	86%

Base: All who have heard of ExxonMobil 190

A third of residents have a better opinion of Exxon than a year ago!

Q. Turning now to ExxonMobil Chemical at the Fife Ethylene Plant, would you say your opinion of the company has changed significantly over the last year?



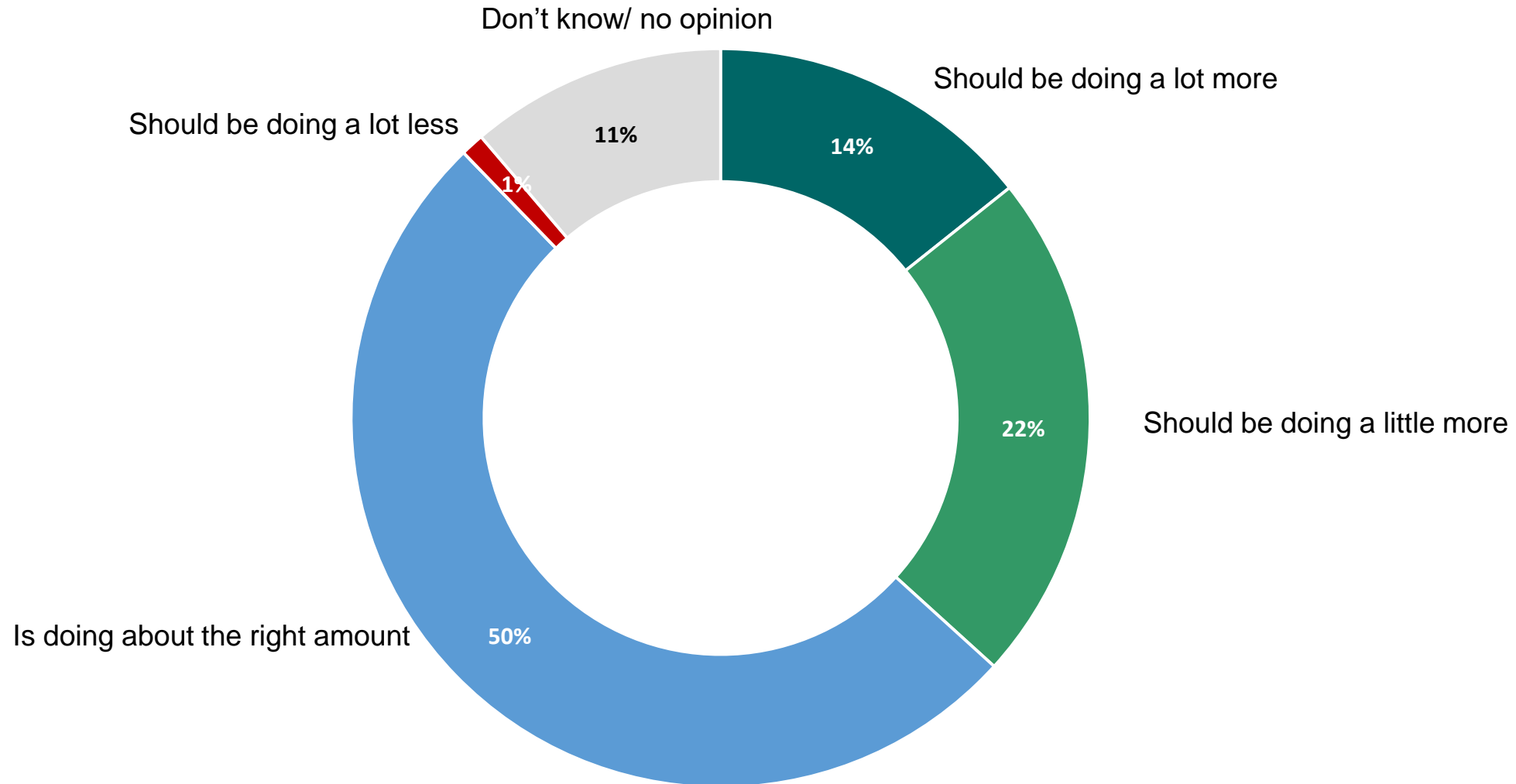
Base: All who have heard of ExxonMobil 190

Perceptions of ExxonMobil



Half (50%) think that ExxonMobil is doing about the right amount for social and environmental issues; 36% think that the company should be doing more

Q. Thinking about ExxonMobil Fife Ethylene Plant, activities on social and environmental issues, do you think it should be doing more, doing about the same amount, or doing less for society and the environment?



Base: All who have heard of ExxonMobil 190

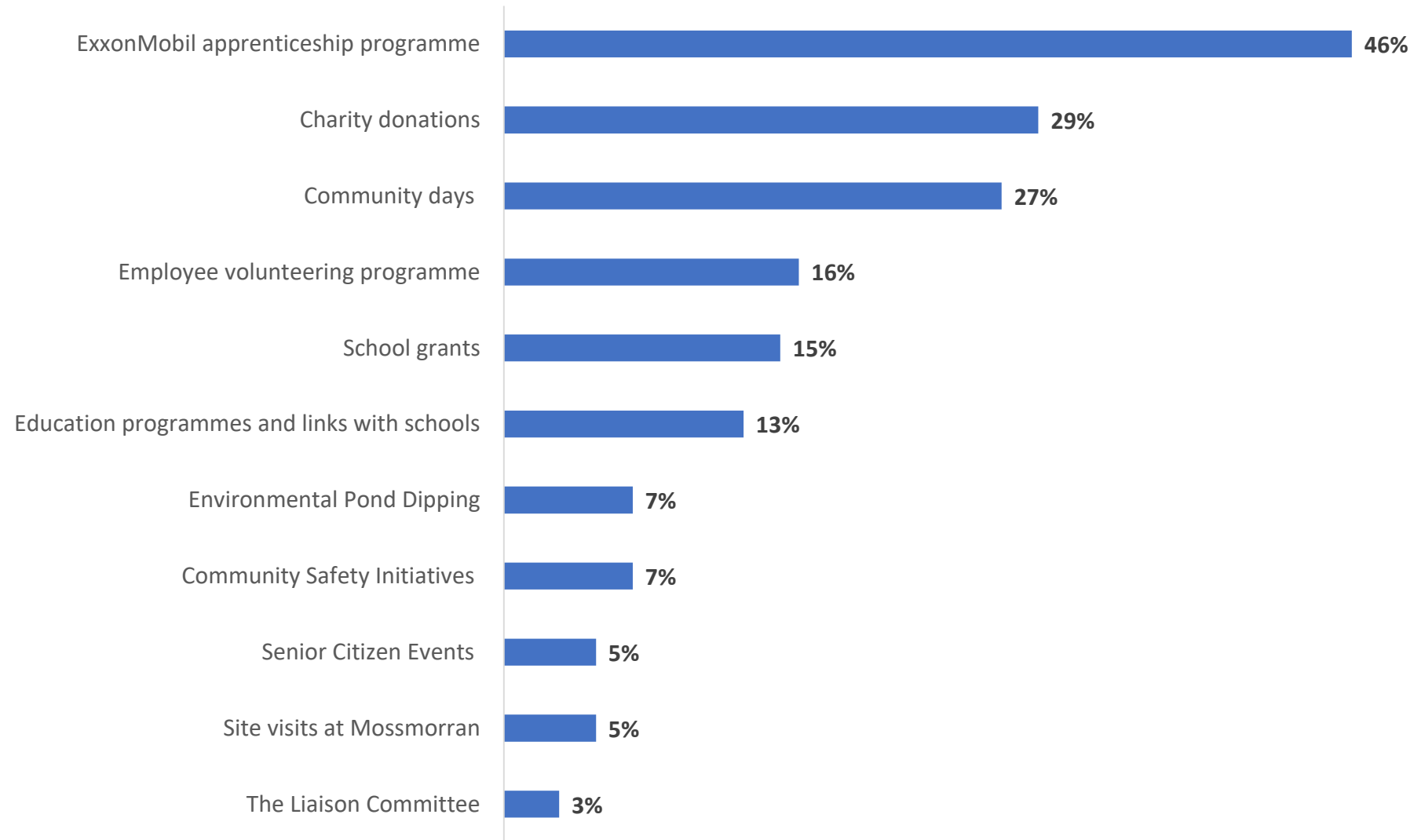
- Universal awareness of company and plant, and what it does BUT Perceptions differ for different types of stakeholders
- Overall seen as “reputable”, “respected” company, with safeguards and standards in place
- However, view that company needs to build trust with the community, regarding emissions and flaring
- Perception that communications and community engagement is sometimes seen as “retrospective crisis management” and possibly not proactive enough in terms of building relationships and ongoing conversations with stakeholders

“Let people in more and explain what they do. It would go an awful long way”
“They could debunk and demystify more”

- Liaison Committee seen as positive and action plan established, but yet to report on the outcomes
- CSR could be oriented towards the key socio-economic challenges of the region e.g. donations to food banks as opposed to pantomimes
- Better engagement with local partners and organisations rather than managing all processes internally

The ExxonMobil apprenticeship programme (46%) was the most commonly known local initiative

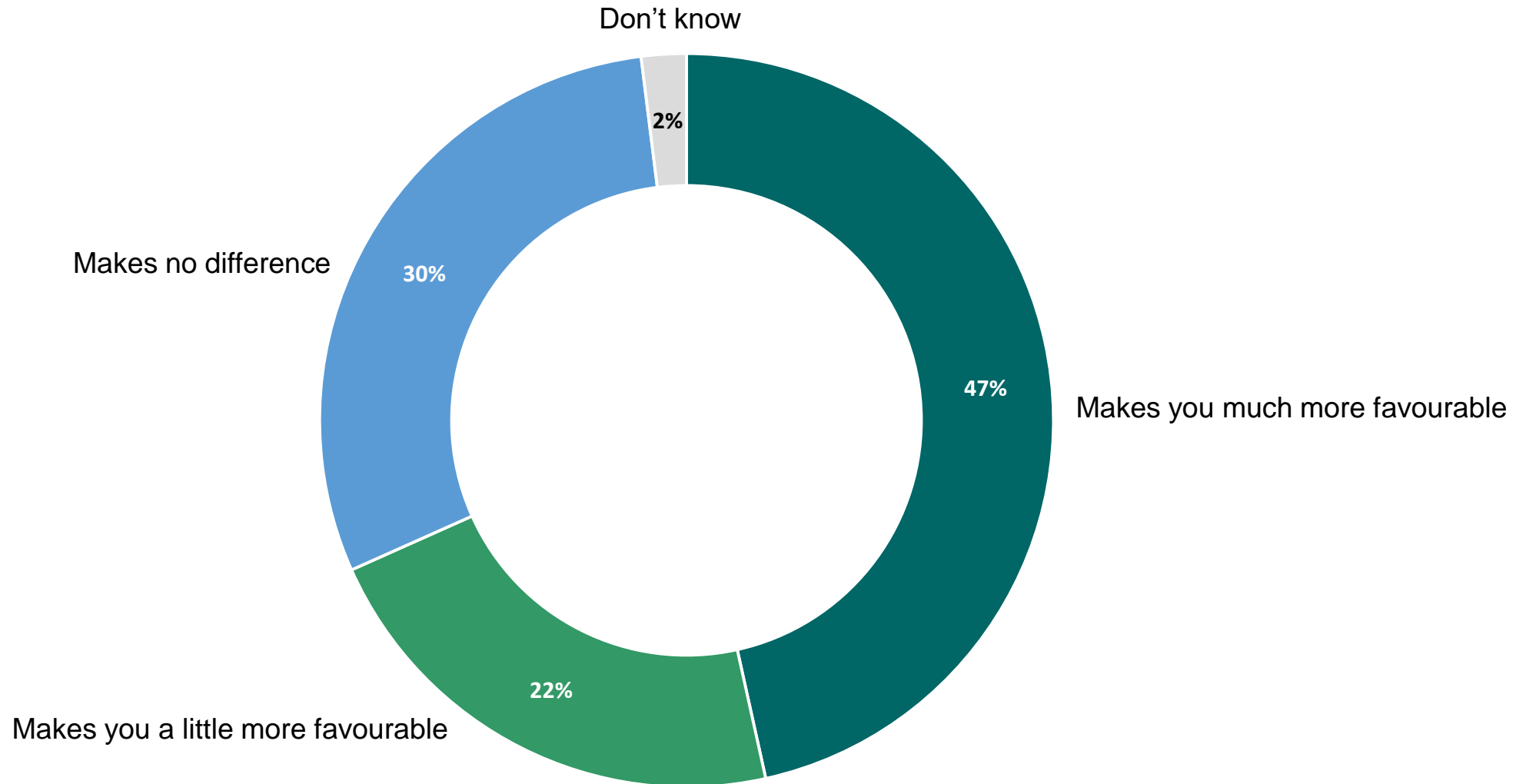
Q. Which of the following local initiatives have you heard ExxonMobil Chemical at the Fife Ethylene Plant, has been involved in the last year?



Base: All who have heard of ExxonMobil 190

The ExxonMobil Apprenticeship programme had a positive impact on perceptions of Exxon – 69% said that it made them more favourable of the company

Q. As you may know, ExxonMobil Chemical at the Fife Ethylene Plant, offers a three-year Apprenticeship programme that provides young people with the training needed to have a career in engineering. Having heard about this programme, what effect, if any, does it have on your overall opinion of ExxonMobil? Does it ...?



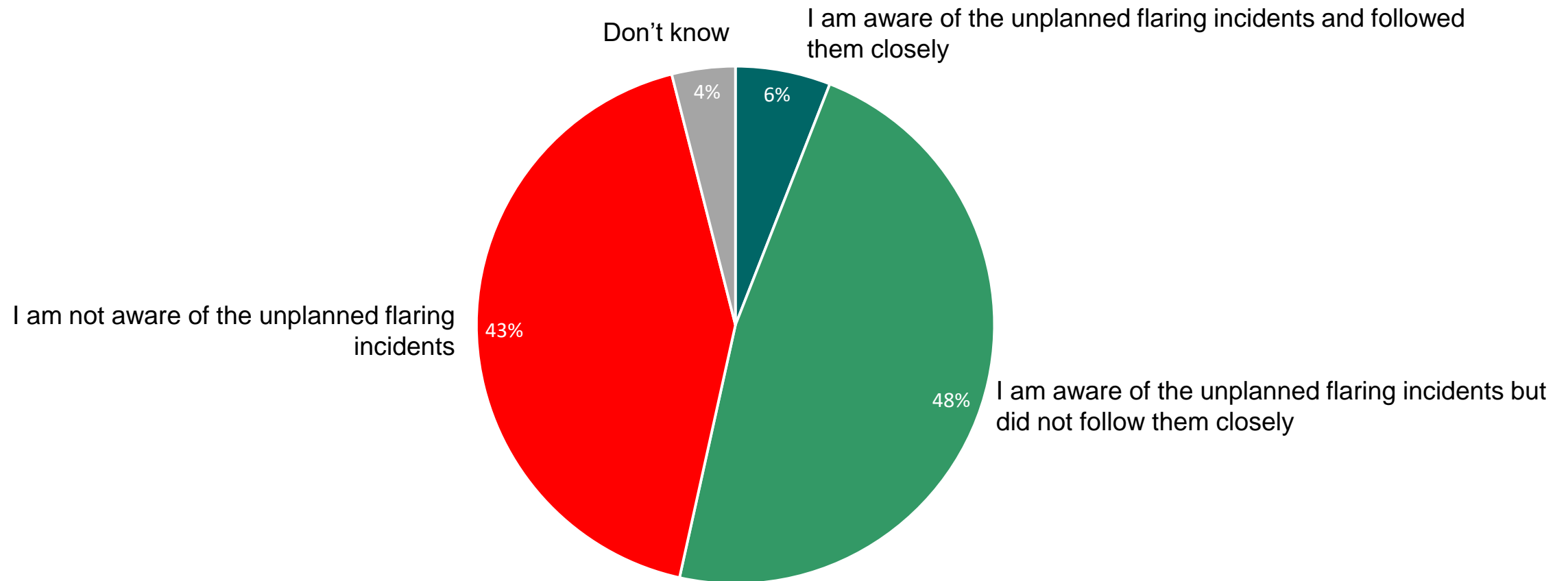
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Views on flaring



There were mixed levels of awareness of unplanned flaring incidents between 2017 and 2018, 54% were aware of the incidents compared to 43% who were not aware

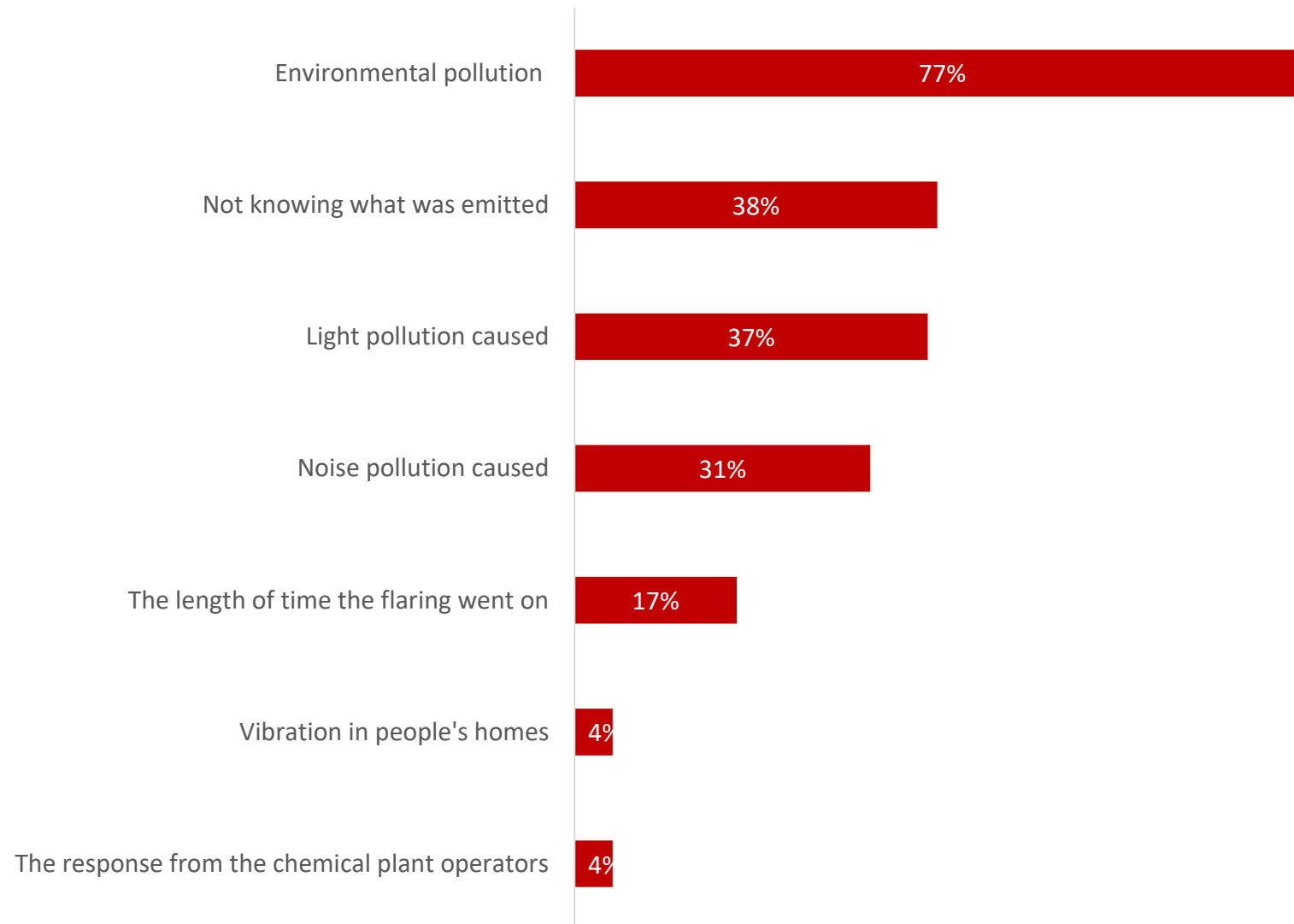
Q. As you may know, sometimes gas which cannot be processed at a chemical plant is burnt because a problem has developed. This is known as 'flaring' and is permitted provided that certain environmental impacts around noise and pollution are kept to a minimum. In 2017 and 2018, a number of unplanned flaring incidents occurred at chemical plants and the plant's operators apologised. Which of the following statements comes closest to your view on these incidents?



Base: All respondents

The top concern regarding the unplanned flaring was the environmental pollution caused

Q. And, in particular, what were your concerns about the unplanned flaring incidents?



Base: All expressing concern about flaring 52

- Higher levels of awareness regarding flaring among opinion formers – key concerns encompass light, noise vibrations, and environmental impact

“it has a huge impact on the local environment”

“In many ways Exxon is a good neighbour but when you see the flaring it becomes negative”

- View that ExxonMobil response to flaring has been improved in recent years, with less use of technical language – however still room for improvement in terms of engaging with the media proactively

“Exxon communicated well during the flaring....but it took ages to sort”

- Often share information and impact statements regarding flaring through their communications – sometimes puts some stakeholders in a difficult situation
- Liaison committee to benchmark flaring among chemical industry – however, yet to report the results
- Ground flaring committee is seen as a positive step to tackle issues
- More information, action on emissions



Discussion

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