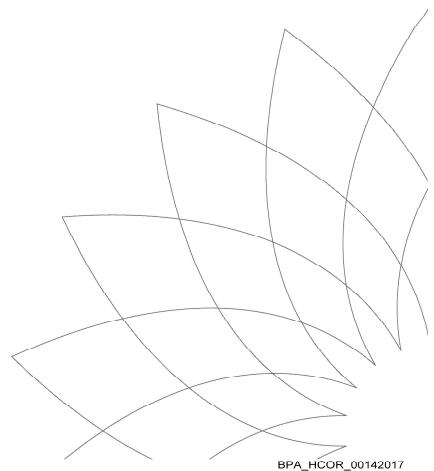




BP reputation research - US

July 2019

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Methodology

Sample n=1,674 US adults (18 years and above).

- Top 10% of gross annual household income.
- Educated to graduate or post-graduate level.
- Engage with certain issues and activities that denote influencer behaviour.

Margin of error

+/- 3%

Fieldwork dates

3rd - 25th July 2019

Changes: April 2019 - July 2019

Throughout the report changes will be indicated as follows:

● = +/- change but not statistically significant (+/- 3%)

● = significant positive change (Apr - Jul)

● = significant negative change (Apr - Jul)



Executive summary

BP's overall reputation remains stable, but further ground is lost relative to peers on advocacy and news impact.

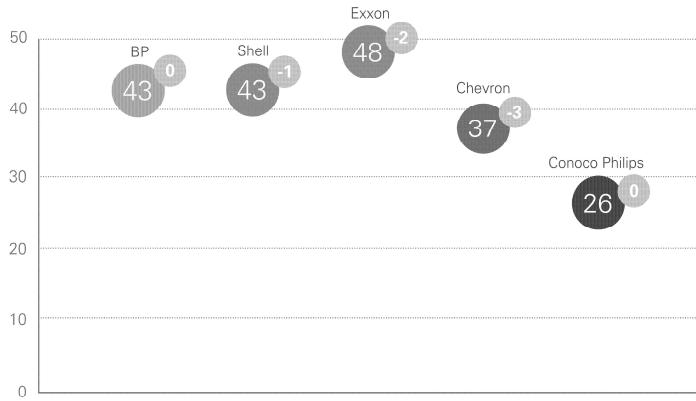
- Headwinds: Further negative news, in period directly following Deepwater Horizon anniversary.
- Advocacy has declined significantly for BP, driven by a greater number of critics. The gap widens with peers.
- Those who have heard about BP in the news are significantly less favourable.
- BP continues to lag behind its peers on all measured attributes but sees some positive shifts in a few areas.
- Exxon and Shell gain further ground over BP, as leaders in low carbon solutions
- Emphasis on positive environmental initiatives and focus on safer operations remains key to enhancing BP's reputation.



Familiarity and advocacy

Familiarity levels remain stable, but BP's advocacy score has significantly declined, and the gap widens with Shell and Exxon.

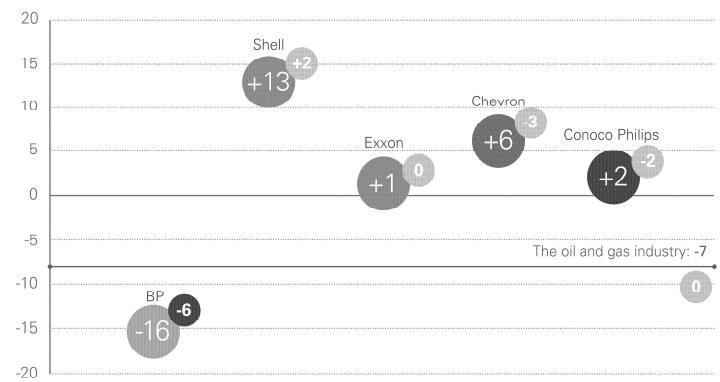
Net familiarity



BP and Shell remain on par, behind Exxon and ahead of the other peers.

Q. How much do you feel you know about [BRAND]?

Net advocacy



In line with the industry BP sees a significant decline, but Shell and Exxon are stable.

Q. Which one of the following statements best reflects your overall opinion and perceptions of [BRAND]?



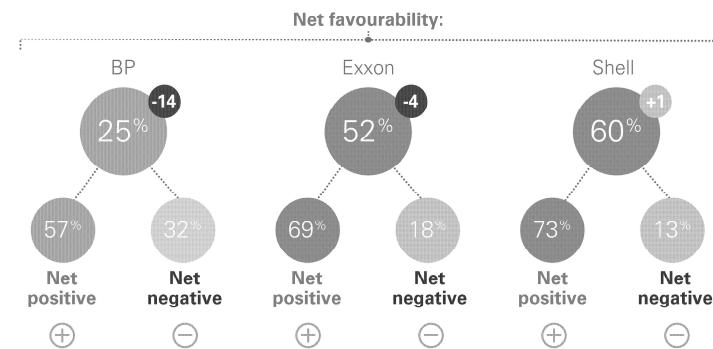
News recall and impact

Awareness of BP in the news continues to be broadly in line with peers, but the impact on favourable opinion towards BP has significantly declined. Exxon has experienced a smaller, though significant decline in net favourability.

% having seen, heard or read anything about [BRAND] anywhere recently?



Impact on favourable opinion



Qs: Have you seen, heard or read anything about [BRAND]? / How has what you have seen or heard about [BRAND] most recently affected the impression you have of them?

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Qualitative findings

Renewed media attention, following the anniversary of DWH, dominated news recall.

However, positive environmental and social investment news, as well as BP's advertising campaign, helps to maintain a net positive score, albeit reduced.

What they have heard about BP

01	Deepwater Horizon (e.g. heard news of the anniversary, watched documentaries etc.)	25%	+5
02	Positive environmental news (e.g. move towards renewable energy etc.)	20%	+1
03	Advertisement (e.g. on TV/billboards etc.)	13%	+1
04	Positive contribution to communities/society (e.g. CSR initiatives, supporting local community initiatives etc.)	5%	+1
05	Negative environmental news (e.g. contributing to pollution)	5%	+2

"Unfortunately it was about the spill in the gulf. The article I read was expressing the idea that the impact is not over."

"I saw a commercial on TV regarding what they are doing to protect the environment."

"BP is currently adding numerous jobs in Alaska which is boosting the economy significantly."

"They are launching a program to work with schools to give people job opportunities in the oil industry to shape the future and increase technology."

"I read an article that the oil spill in the Gulf of Mexico a few years ago is still ongoing and killing the local ocean ecosystems."

Q: What did you hear most recently about BP?

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Qualitative findings

Information about BP's commitment to a lower carbon future remains the most important topic.

Reassurances around BP's safety and environmental responsibility are also needed.

What they would like to hear from BP

01	Making positive environmental changes (e.g. move towards renewable energy etc.)	38%	+4
02	Apology for oil spill/clean up oil spill (e.g. Deepwater Horizon, apology to local communities etc.)	16%	+1
03	Safer operations (e.g. employee safety, environmental safety etc.)	12%	+4
04	Lower fuel prices (e.g. increasing UK business, oil exploration etc.)	7%	-2
05	Economic improvements/business expansion (e.g. expansion in US market, higher dividend payouts etc.)	3%	+1

"I would like to hear that they are making strides to be a clean provider of energy on a global basis."

That they are paying the entire bill for the damage they did to the Gulf of Mexico and the people that rely on it for a living. This might put them out of business, but that'd be a wonderful message to send to the corporate world that they will be held accountable for awful behavior."

"I'd like to hear that they are truly improving safety in their operations."

"That they have cleaned up the Gulf and are switching to 100% renewable resources."

That they are committed to helping the US economy.

Q: If there was one thing you would like to hear from BP what would it be?

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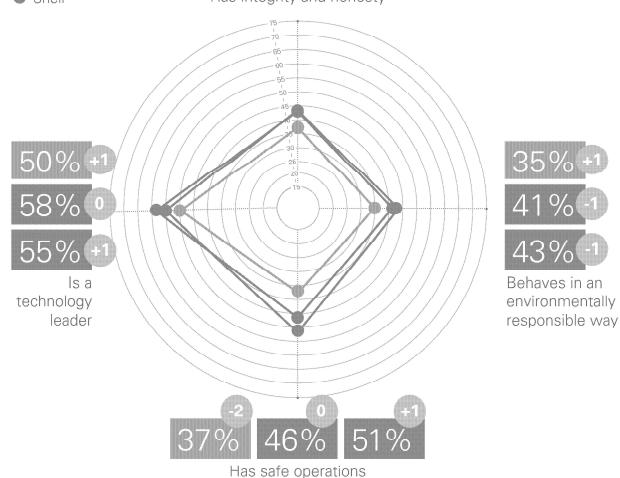


Attributes - character

Overall, BP remains behind its peers on all attributes, however, despite low ratings, BP sees some significant positive shifts in a few areas.

BP has remained stable on all character attributes.

- BP
- Exxon
- Shell

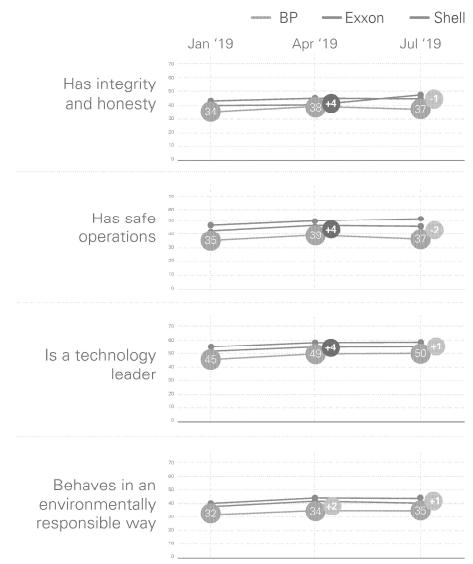


Q. Looking at the series of phrases below, how well does each one apply to [BRAND]? Please use a scale of 1-7 with one meaning the attribute does not apply to the company at all, and 7 meaning it completely applies. How well does [insert attribute] apply to [BRAND]?

Aggregate score

40% 0 47% 0 49% +1

Progress over time

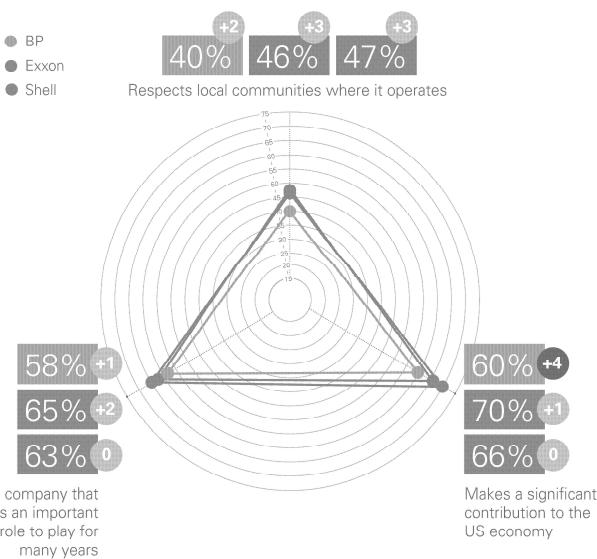




Attributes - contribution

There has been a further uplift in BP's contribution to the US economy - its strongest score overall.

- BP
- Exxon
- Shell

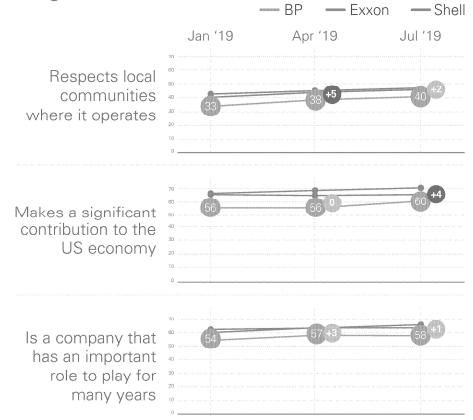


Q. Looking at the series of phrases below, how well does each one apply to [BRAND]? Please use a scale of 1-7 with one meaning the attribute does not apply to the company at all, and 7 meaning it completely applies. How well does [insert attribute] apply to [BRAND]?

Aggregate score

53% +2 60% +2 59% +1

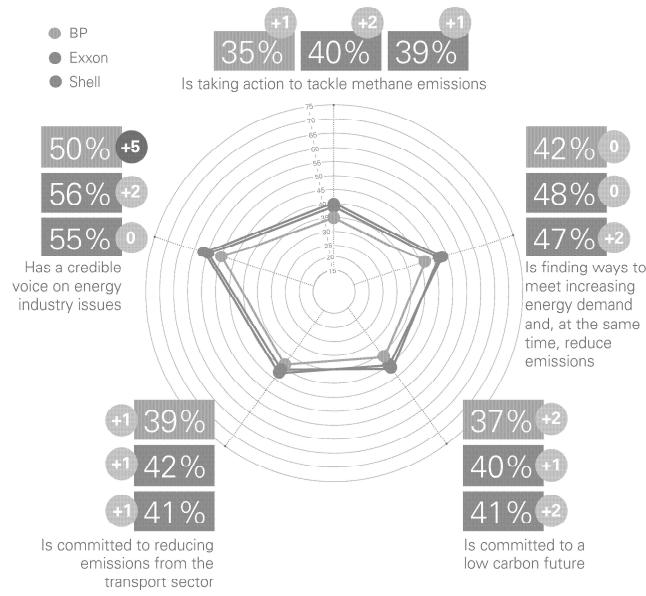
Progress over time





Attributes - connected to the future

BP sees a significant increase in having a credible voice on energy issues and closes the gap with peers.

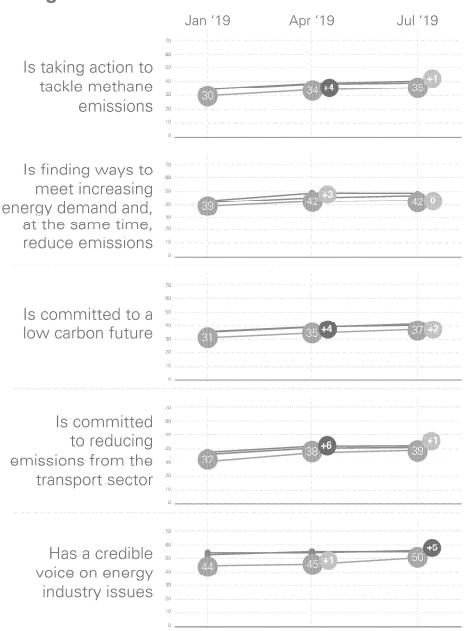


Q. Looking at the series of phrases below, how well does each one apply to [BRAND]? Please use a scale of 1-7 with one meaning the attribute does not apply to the company at all, and 7 meaning it completely applies. How well does [insert attribute] apply to [BRAND]?

Aggregate score

41% +2 45% +2 45% +2

Progress over time

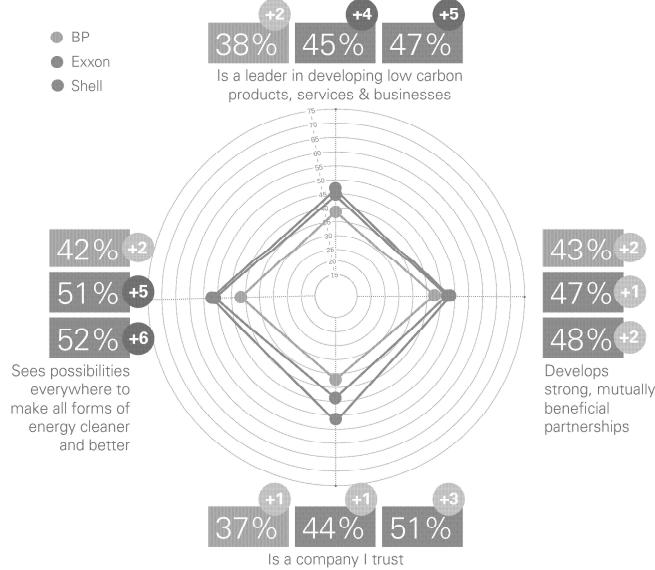




Attributes - brand specific

While BP scores remain consistent, both Shell and Exxon have seen significant gains for low carbon products, services and businesses.

BP makes less progress on 'possibilities everywhere', suggesting real cut through from the campaign is still to be realised.

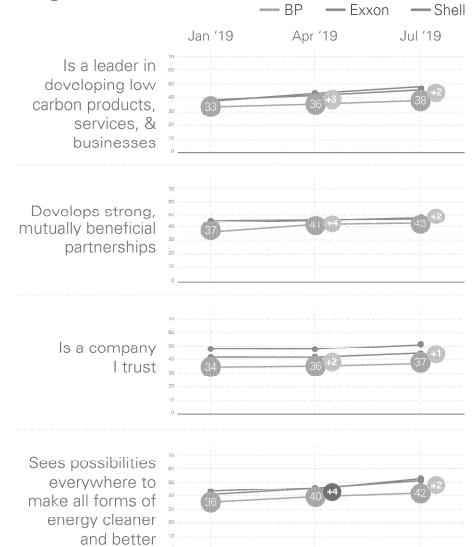


Q. Looking at the series of phrases below, how well does each one apply to [BRAND]? Please use a scale of 1-7 with one meaning the attribute does not apply to the company at all, and 7 meaning it completely applies. How well does [insert attribute] apply to [BRAND]?

Aggregate score

39% +1 45% +2 48% +4

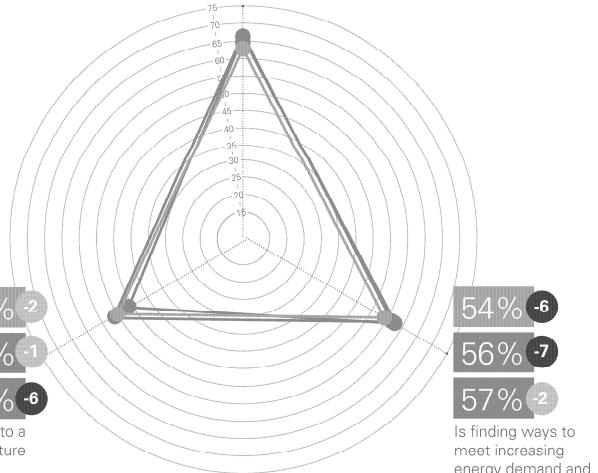
Progress over time





Attributes by BP news aware*

Connected to the future

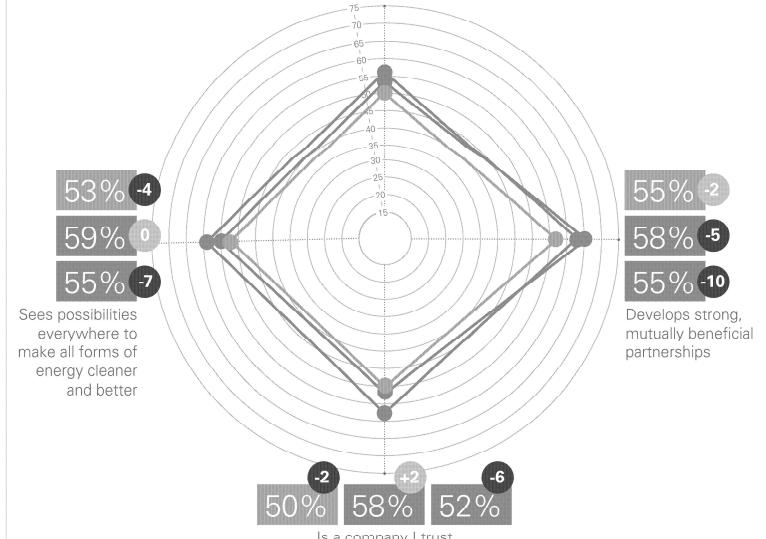


Q. Looking at the series of phrases below, how well does each one apply to [BRAND]? Please use a scale of 1-7 with one meaning the attribute does not apply to the company at all, and 7 meaning it completely applies. How well does [insert attribute] apply to [BRAND]?

*Base: All those with recall of BP in the news. Trends based on equivalent for April data

Among the news aware, BP's scores decline for dual challenge and possibilities everywhere.

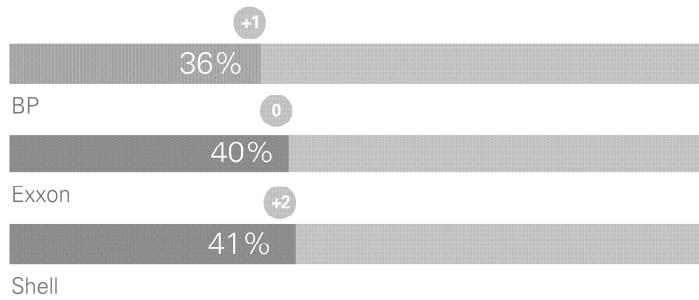
Brand specific attributes





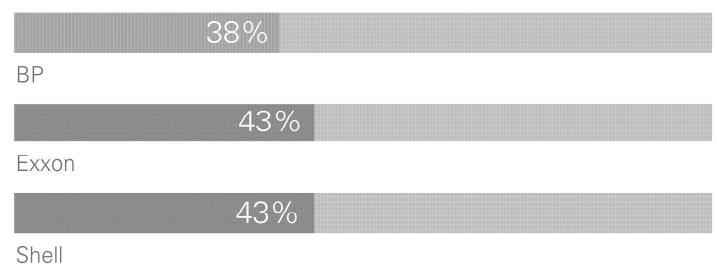
Country-specific attributes

Is playing a leading role in shaping climate policy for the better



BP remains stable for shaping climate policy, but slightly behind its peers.

Is working together with others to address the climate challenge



BP is behind Shell and Exxon for forming partnerships to address the climate challenge.

Q. Looking at the series of phrases below, how well does each one apply to [BRAND]? Please use a scale of 1-7 with one meaning the attribute does not apply to the company at all, and 7 meaning it completely applies. How well does [insert attribute] apply to [BRAND]?

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