

**Jack Felton Golden Ruler Award Entry**

**2008**

**A National Dialogue on Energy Security**

The U.S. Communication Team of Shell Oil Company,  
with Burson-Marsteller and A Brink & Company

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## **A National Dialogue on Energy Security - Summary**

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When Shell Oil Company launched an 18-month project to improve the understanding of energy issues among business and community leaders, measurement quickly became an integral part of the project. The core of the project was a national dialogue – a 50-city, face-to-face tour led by the U.S. head of Shell. The challenge of measuring face-to-face communications was met through a combination of quantitative and qualitative research throughout the span of the program. To complete the feedback loop, participants received a final report summarizing the tour and measurement data.

Key elements of the research and measurement process included:

- Formal public opinion surveys measuring attitudes toward energy issues and energy companies correlated with awareness of the tour, conducted at the beginning, midpoint and end of the tour;
- Qualitative feedback on three energy questions gathered from audiences through a formal town hall feedback process and documented on the tour website, [www.shell/usenergysecurity.com](http://www.shell/usenergysecurity.com);
- Quantitative data on the same three questions through a formal opinion survey of a sampling of town hall attendees compared to a sampling of the general population;
- A written report back to the audiences, sent to all town hall participants and other key stakeholders.

This unique approach brought measurement into the heart of the program, as ongoing audience feedback helped shape the company's response and messaging, and became part of the outreach effort itself through dissemination of the final report document.

# A National Dialogue on Energy Security

## Objectives

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In early 2006, it was clear to the leaders of Shell Oil Company that the company faced a reputation crisis in the United States. Increased global energy demand had been pushing prices up since 2003, but the supply crunch and price spikes triggered by the 2005 hurricanes created a new level of anger and ill-will toward oil companies. The result: negative press, angry customer letters, and three summonses for the U.S. head of Shell, John Hofmeister, to testify with other oil leaders before a hostile Senate audience. This anger and mistrust toward the industry created barriers to developing public policies that could improve U.S. energy security.

The most direct threat to Shell came from legislators and regulators who were proposing measures that would harm our ability to meet U.S. energy needs. Our strategy needed to reach two key audiences: policymakers, including both state and federal lawmakers and federal energy regulators; and those influencing them – the business and community leaders who make themselves heard to their members of Congress, regulators and other policymakers.

Research became a key element of the strategy. We identified the following research objectives:

1. Understand our audiences' perceptions about the energy industry, energy policies and Shell Oil Company;
2. Measure the effectiveness of our communications on this issue; and
3. Use the research data to shape ongoing messages about the need for public policy changes.

## Strategy

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Our overall campaign strategy was to reach deep into communities to engage with a diverse group of stakeholders to improve understanding of energy issues and perceptions of the industry. We chose to take a grassroots approach, to counter the “big oil” image with a human, face-to-face campaign: “A National Dialogue on Energy Security.” John Hofmeister was instrumental in developing the concept and committed to going out personally to 50 cities across America. In each market he participated in speaking engagements, town hall meetings and small-group meetings with community leaders, policymakers and influencers. Our key messages: access to domestic supplies, diversity of fuel sources, and the need to moderate demand

The research/measurement strategy supporting this effort was twofold:

- Conduct opinion surveys at the beginning, midpoint and end of the 18-month campaign to measure perceptions and track changes in perceptions
- Gather input from participants at town halls in each city and compile as data that can be used with policymakers and other audiences

## Execution

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Burson-Marsteller conducted upfront research to identify 50 key markets across the United States and the demographics, issues and media in each of those markets (Tab 1). The tour, managed by a team led by Chris Bozman, Deputy Director, U.S. Communications, began in June 2006 and ended in November 2007. Ongoing research was conducted by Penn, Schoen & Berland Associates, a Burson-Marsteller subsidiary, and the final report was compiled by A Brink & Company. Budget: approximately \$500,000 (for research and measurement components)

## Tactics

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**Tracking survey:** In October 2006, after only a few presentations had been given, the first tracking study was conducted by PS&B. Key audiences targeted for this study included the general public, community leaders, business leaders, influential elites in Washington, D.C., and people who work for NGOs and the media. The study measured

perceptions of the overall energy industry, perceptions of Shell vs. other oil companies, and perceptions on energy supply and demand and environmental issues.

Not surprisingly, awareness of the tour was low and perceptions of the industry were negative. This became the baseline for future research. A second survey was conducted in February 2007, after a heavy tour schedule in October, November, January and February. Based on this survey, we adjusted our messaging (for example, spending less time describing the issues and more time talking about what Shell was doing to address them). The final survey was conducted in late November 2007. An additional flash poll was conducted in May 2007 immediately following a round of national media appearances by John Hofmeister. Those results were folded into the overall tour data.

**Town hall research:** The tour began as a speaking tour, but the need for more on-the-spot, documentable community feedback became evident immediately. We incorporated a town hall event in each market with Hofmeister and two to three other Shell executives. Influencers including community leaders, business leaders and non-governmental organizations were invited to the town halls by Burson-Marsteller, using lists developed as part of the advance research. In these sessions, participants were asked to give their input on priorities and solutions to energy supply issues. We asked participants three questions:

- What should the U.S. be doing to increase domestic oil supply?
- What should the U.S. be doing as a nation to manage energy demand/consumption?
- What is your vision of the U.S. energy portfolio in the coming decade and beyond?

Ideas were gathered on index-card-sized Post-Its. Input on each topic was summarized and presented to the audience at the end. The Post-It notes were transcribed and posted on [www.shell/usenergysecurity.com](http://www.shell/usenergysecurity.com), where site visitors could also add their own responses. At the end of the tour we also conducted research to provide a quantitative and statistically reliable view of the feedback we received at the town halls. We surveyed a sampling of town hall attendees and a sampling of the general public and asked the same questions that had been asked at the tour as well as questions evaluating attitudes toward Shell.

**Final report:** Completing the feedback loop, at the end of the tour we compiled all the research data, including survey data and verbatim remarks, and used it to create a summary “final report” that was published as a 20-page booklet. The report was emailed to all town hall participants, presented at a wrap-up event at the U.S. Chamber of Commerce in February 2008 and distributed to key policymakers.

## Evaluation of Success

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Not only did the research show that the program was successful in achieving its objectives, the research itself also became an integral part of furthering the goals of the “National Dialogue on Energy Security.”

**Tracking survey:** Tracking research showed that among those aware of the tour, Shell had a 61 percent favorability rating at the end of the tour, compared to a 48 percent rating at the beginning of the tour. Comparatively, only 17 percent of those unaware of the tour were favorable towards Shell. In an analysis of attributes, Shell received the highest rankings of all major energy companies among business leaders as an “industry leader,” (25 percent in November 2007 vs. 16 percent in October 2006). First-place rankings on this attribute also rose among other audiences: from 15 percent to 20 percent among community leaders and from 5 percent to 25 percent among media. In addition, Shell is now the pacesetter in the industry across nearly all audiences for being “credible,” “trustworthy” and “caring about Americans.” In the final tracking survey there was a significant increase among NGOs associating Shell with the attributes “environmentally sound” and “cares about Americans.” Interestingly, Shell attributes declined in some areas between February 2007 and November 2007. PS&B mined the data and determined that this came from those who had heard about the tour early on and were now expecting the next step – actions or solutions proposed or provided by Shell. Shell used that feedback in developing its final report and it continues to shape 2008 messaging.

**Town hall feedback:** In the town hall survey, 62 percent of those who had attended the town halls were favorable toward Shell, compared to 33 percent of the general public (other oil companies also received more favorable ratings from attendees, but Shell was rated highest).

**Final report:** The town hall verbatim comments were used to tell the story of Shell's tour experience and bring the research to life in the final summary report. An initial run of 3,500 copies was almost immediately exhausted due to requests for copies. The report was also posted on the Shell U.S. Energy Security website and generated a 253 percent increase in site traffic to the website. The site continued to see an increase in traffic throughout March. We estimate that the report was downloaded more than 17,000 times within the first month. Most important, the key messages, including access to domestic supplies, diversity of fuel sources, and the need to moderate demand, have been increasingly picked up in key discussions among elected officials and other influencers.