

The Pivotal Role of Communications in the Natural Gas Industry During the Energy Transition

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Prepared for



TABLE OF CONTENTS

INTRODUCTION

DEFINING THE ENERGY TRANSITION AND THE ROLE OF NATURAL GAS

- Defining the Energy Transition and its Goals
 - The Evolving Role of Natural Gas within the Energy Transition
-

COMMUNICATING NATURAL GAS: POWERING THE TRANSITION NARRATIVE

- A SWOT Approach to Strategic Communication
 - Challenges and Opportunities in Effective Communication
 - Identifying Key Stakeholders in the Sector
 - Analyzing Communication Strategies of Natural Gas Companies
 - Adapting Gas Communication Across Regions
 - Public Perception and Media Narratives
 - The Role of Different Communication Channels
 - Comparison with Other Energy Sectors (Renewables)
-

RECOMMENDATIONS

CONCLUSION

REFERENCES

4

4

6

12

12

13

Introduction

The global energy landscape is undergoing a fundamental transition from fossil fuel-based systems to those increasingly powered by renewable energy. This shift is driven by the urgent need to reduce carbon dioxide (CO₂) and other greenhouse gas emissions in response to the escalating climate crisis.

However, this transition is complex and gradual - requiring technological innovation, infrastructure development, and supportive policy frameworks to ensure energy security and sustainability.

Within this evolving landscape, natural gas holds a critical yet debated role. Positioned as a lower-carbon alternative to more emissions-intensive fuels like coal, it is often seen as a transitional energy source. Still, its long-term place in a net-zero future remains under discussion. For the natural gas industry, clearly communicating its role in supporting energy security, enabling renewables, and addressing environmental challenges is essential. Its future relevance will depend on its ability to demonstrate commitment to decarbonization and engage stakeholders through transparent, strategic communication.

Defining the Energy Transition and the Role of Natural Gas

A. Defining the Energy Transition and its Goals:

The energy transition is a systemic shift in how energy is produced, distributed, and consumed, moving away from fossil fuels to renewable sources like solar, wind, and geothermal. This transformation aims to reduce greenhouse gas emissions, combat the climate crisis, and foster sustainable development. It focuses on enhancing energy efficiency, deploying advanced technologies such as energy storage, and decarbonizing sectors like electricity, transportation, and industry.

Key global targets include reducing emissions and achieving carbon neutrality by 2050 or earlier, with the goal of limiting global warming to well below 2°C, ideally 1.5°C, in line with the Paris Agreement. These objectives require a rapid reduction in fossil fuel use, creating challenges and opportunities for the natural gas industry to redefine its role.

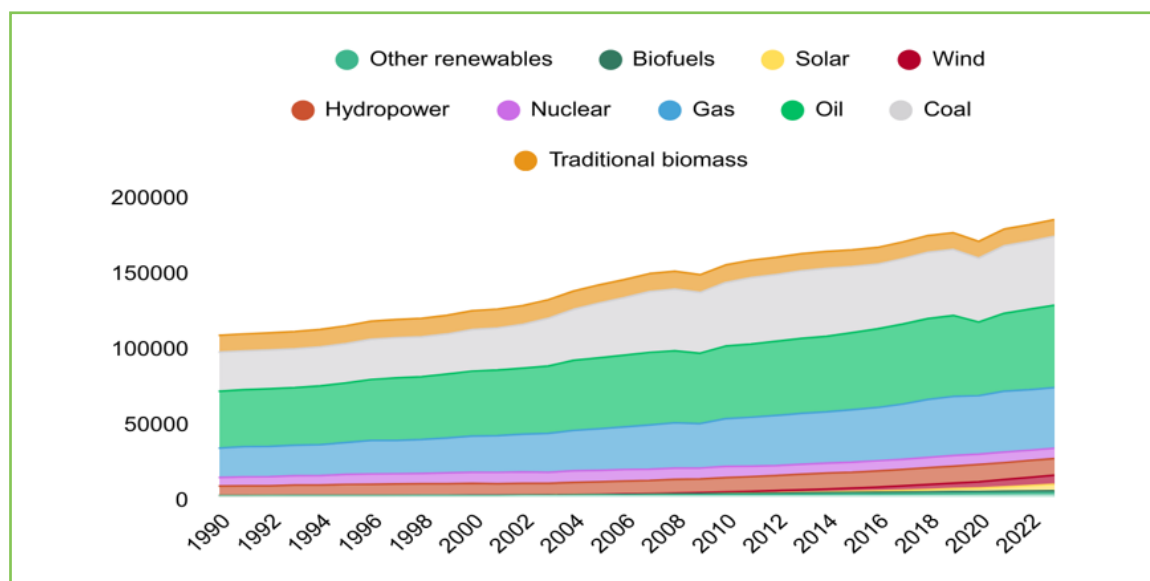
An essential aspect of the energy transition is a “just transition,” ensuring social equity and inclusivity. It involves addressing the potential negative impacts on communities reliant on fossil fuels and vulnerable populations affected by energy costs or insecurity. Effective communication must incorporate these social dimensions, ensuring the shift is fair and benefits all stakeholders.

B. The Evolving Role of Natural Gas within the Energy Transition:

In the context of the global energy transition, natural gas is increasingly seen as a vital, lower-carbon energy source - particularly as a flexible alternative to higher-emission fossil fuels during the shift towards renewables. Often described as a “bridge fuel,” natural gas can support a more secure and stable transition by replacing coal and, in some cases, oil.

Between 1990 and 2023, natural gas consumption more than doubled, reflecting its increasing role in the global energy mix. This significant growth is driven by natural gas's comparative advantage over other fossil fuels, offering a cleaner alternative with lower CO₂ emissions. Its use has expanded across various sectors, from power generation and industrial processes to transportation, as countries shift toward more sustainable energy sources. This surge in demand also highlights the industry's pivotal role in supporting the global energy transition, balancing renewable energy sources, and providing a reliable supply of energy to meet growing economic and population needs.

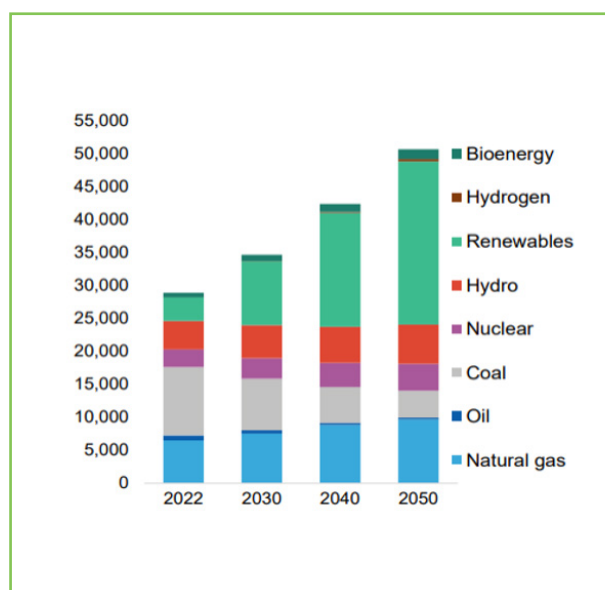
Global Primary Energy Consumption By Source (TWh)



Source: Our World in Data

Natural gas is expected to play a central role in the electricity sector's growth through 2050, alongside renewables, reflecting the broader and dual shift to cleaner energy sources. Its' share in the global energy mix is projected to rise from 23% (2023) to 26% (2050).

Global Electricity Generation (TWh)



Source: GECF Global Gas Outlook 2050

Natural gas also plays a critical role in global energy security, with over 150 countries relying on imports to meet their energy needs. This widespread dependency highlights the significance of natural gas in the global energy landscape, with Asia accounting for 45–50% of global imports, Europe at 30–35%, North America at 10–15%, the Middle East at 5–7%, Latin America at 5%, and Africa at 2–3%. As of 2023, over 150 countries import natural gas. Meanwhile, Global LNG trade reached 401 million tonnes, marking a 2.1% increase YoY.

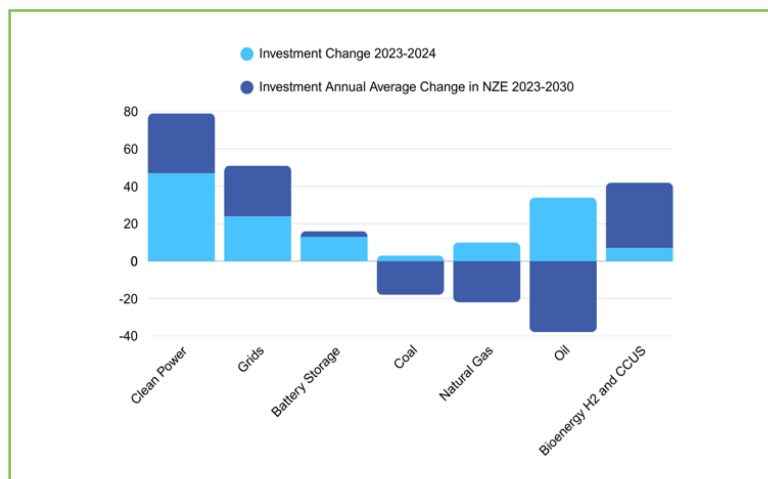
Natural gas's emissions advantage lies in its lower carbon footprint - with methane combustion generating around 50% fewer CO₂ emissions than coal. Additionally, gas-fired power plants offer critical flexibility, enabling rapid response to fluctuations in electricity demand and supporting the integration of intermittent renewables like solar and wind.

However, the role of natural gas is not without challenges. Methane - the primary component of natural gas - is a potent greenhouse gas with a far higher short-term global warming potential than CO₂. Emissions across the gas value chain, from production to consumption, risk undermining its climate benefits. As a result, reducing methane emissions has become a top priority for industry and policymakers, with increasing focus on leak detection, monitoring technologies, and stricter regulations.

In the Net Zero Emissions by 2050 Scenario, methane intensity from oil and natural gas is expected to drop from 1.3% in 2023 to 0.4% by 2030. By 2040, tech advances will cut non-emergency methane emissions to 0.2%, and to 0.1% by 2050.

While some argue that natural gas investments may delay the clean energy transition, others see it as a pragmatic solution, especially in regions with growing energy demand or renewable constraints. Global energy investment exceeded \$2 trillion in 2024, with two-thirds going to renewables; natural gas attracted \$370 billion. Natural gas receives 15–18% of global energy investment.

World Energy Investment (\$ Billion)



Source: World Energy Investment 2024, IEA

Communicating Natural Gas: Powering the Transition Narrative

1. A SWOT Approach to Strategic Communication



Strengths

- Builds public trust through transparency and clarity.
- Shapes narratives and drives stakeholder alignment.
- Amplifies impact using data, storytelling, and tailored messaging.

Weaknesses

- Often technical, fragmented, or defensive.
- Struggles to connect emotionally or simplify complexity.
- Inconsistent messaging across sectors and regions.

Opportunities

- Digital platforms for engagement and storytelling.
- Partnerships with trusted voices (scientists, influencers, NGOs).
- Using real-world examples to show local impact and benefits.

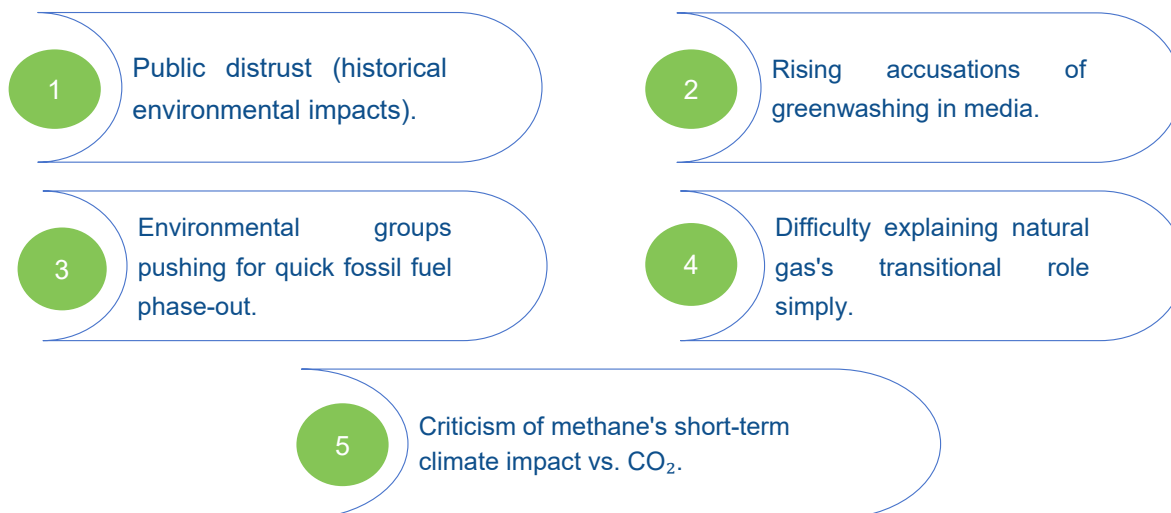
Threats

- Misinformation and rising skepticism.
- Lack of engagement creates policy resistance or public pushback.
- Competing narratives dominating the conversation.

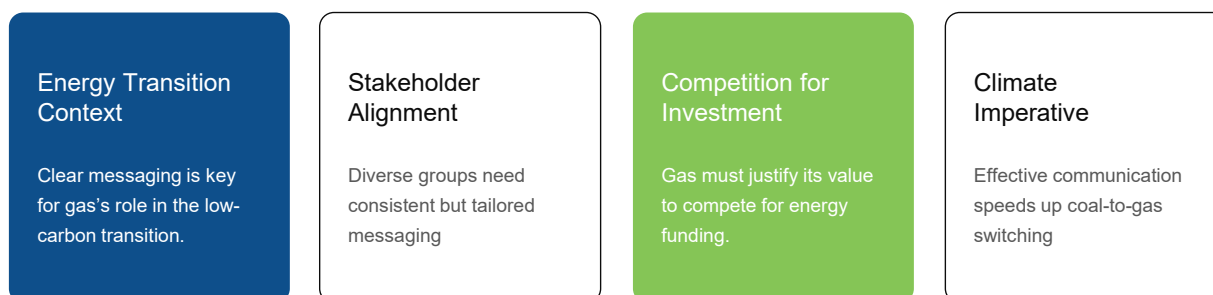
2. Challenges and Opportunities in Effective Communication

The natural gas industry faces both significant challenges and potential opportunities in effectively communicating its role during the energy transition.

Communication Challenges in the Gas Industry

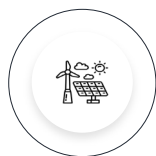


Why Effective Natural Gas Communication Matters



Promoting Natural Gas Key Roles

Beyond power generation, natural gas will play a role in hard-to-abate sectors like industry and heavy transport, and as a feedstock for low-carbon hydrogen, particularly with carbon capture and storage (CCUS). Although its share in the energy mix will decline, natural gas remains crucial for energy security, flexibility, and decarbonization if its environmental footprint, especially methane emissions, is managed



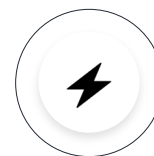
Critical for Grid Stability



Powers Heavy Industries



Drives Hydrogen Production



50% Lower CO₂ than Coal

1. Balances intermittent renewables like solar and wind.
2. Key for decarbonizing cement, steel, and chemicals (over 90% of emissions).
3. Supports clean fuel development and CCUS.
4. Cleaner when used for power generation.



In 2024, natural gas was the 2nd-largest power source, supplying over 20% of global electricity.

Natural Gas Role in Energy Resilience

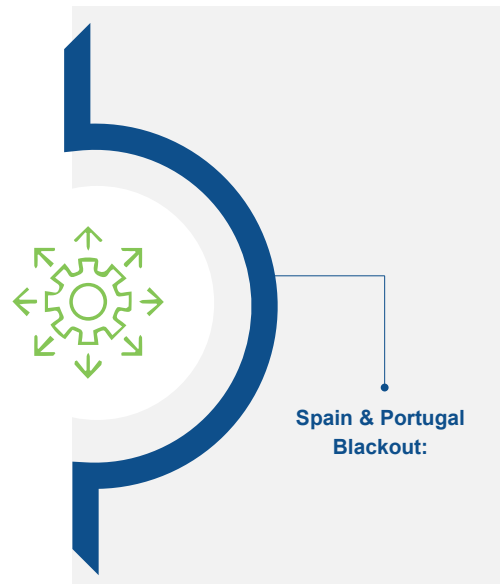
On April 28, 2025, a 12-hour blackout impacted 55 million people due to power plant disconnections and frequency drops.

Renewable Energy Impact: Lack of inertia from renewables worsened grid instability during the outage.

Transmission Failure: A failure in the Spain-France grid connection contributed to the blackout.

Gas Role in Stability: Natural gas plants stabilize the grid by providing inertia and quickly adjusting to renewable energy drops.

Policy Implications: The event highlights the need for better grid infrastructure, a balanced energy mix, and policy reevaluation



3. Identifying Key Stakeholders in the Sector

The natural gas industry and its navigation through the energy transition involve a complex web of stakeholders, each with distinct interests and the ability to influence the industry's trajectory.

A. Companies: A diverse range of companies are involved in the natural gas value chain. This includes natural gas producers engaged in the exploration and extraction of natural gas resources. Midstream companies play a crucial role in the transportation and storage of natural gas through extensive pipeline networks and in the form of liquefied natural gas (LNG). Downstream companies are responsible for the distribution of natural gas to end consumers, including residential, commercial, and industrial users, as well as its utilization in power generation facilities. Notably, there is an increasing trend of traditional oil and gas companies investing in and forming partnerships with renewable energy companies. This strategic diversification suggests a potential evolution in their core business models and consequently in their communication strategies, which may broaden to encompass a wider portfolio of energy sources .

B. Governments: Governments at both national and regional levels are pivotal stakeholders, as they establish the overarching energy policy frameworks and set legally binding climate targets that shape the future of the energy sector. Regulatory bodies operate under governmental mandates to oversee the operations of the natural gas industry, issuing licenses and permits, and ensuring strict adherence to environmental protection and safety compliance standards. Policymakers face the intricate challenge of balancing multiple competing priorities, including fostering economic development, demonstrating global climate leadership, ensuring national energy security, maintaining energy affordability for consumers, and enhancing the overall resilience of the energy system .

C. Consumers: Consumers represent a broad and diverse group of stakeholders. Residential consumers directly utilize natural gas for essential purposes such as heating their homes, cooking their meals, and powering some of their appliances. Industrial consumers rely on natural gas as a critical input for various manufacturing processes. Across these diverse consumer segments, key priorities typically include the affordability of energy, the reliability and security of its supply, and an increasing awareness of the environmental impact associated with their energy choices.

D. Environmental Organizations: NGOs and advocacy groups play an influential role in shaping the energy transition narrative. Their core focus is on addressing climate change, protecting the environment, and driving the adoption of sustainable energy solutions.

Many of these organizations are vocal critics of fossil fuel reliance, including natural gas, and advocate for an accelerated shift towards renewable energy. While some are willing to engage with the natural gas sector on initiatives aimed at reducing emissions or improving sustainability practices, others firmly call for a full and rapid phase-out of fossil fuels altogether.

E. Other Stakeholders: Other key stakeholders include investors prioritizing ESG performance, local communities concerned with environmental and safety impacts, and employees focused on job security and industry stability. The media shapes public perception, while academia and researchers provide valuable insights and innovations influencing the sector's future.

4. Analyzing Communication Strategies of Natural Gas Companies

Natural gas companies employ a variety of communication strategies to articulate their role in the ongoing energy transition and to engage with their diverse stakeholders.

A. Common Messaging Themes: A central theme is the “bridge fuel” narrative, positioning natural gas as a cleaner alternative to coal and a flexible complement to renewables. Companies highlight its lower emissions, reliability, and affordability, appealing to concerns over energy security and economic stability. Additionally, companies emphasize investments in innovation, such as carbon capture (CCUS), renewable natural gas (RNG), and hydrogen blending, to reduce emissions. Amid global geopolitical events, energy security has become a more prominent theme, with natural gas positioned as vital for a stable and diversified energy

B. Examples of Company Communication: Eni, for example, communicates that natural gas plays a key role in the energy transition due to its flexibility and accessibility. They highlight its lower carbon footprint compared to other fossil fuels and its centrality to their strategy for achieving Net Zero by 2050. Reports from Wood Mackenzie emphasize natural gas's crucial role as a bridge in the energy transition, supporting the expansion of renewables and accelerating the shift away from coal, while also noting that LNG has a significantly lower GHG intensity than coal.

C. Evolving Communication Strategies: The communication strategies of major oil and gas companies, including natural gas, have evolved significantly. There's been a shift from denying climate change to acknowledging it, though many still emphasize a gradual transition and the ongoing need for fossil fuels. Companies now highlight their investments in renewable energy and lower-emission technologies. Social media has become an essential tool for companies to communicate directly with the public, share updates, and discuss the energy transition. However, this has also led to accusations of "greenwashing," with some companies accused of exaggerating their environmental efforts or downplaying the role of fossil fuels. Additionally, some companies use influencers on social media to promote a "climate-friendly" image.

5. Adapting Gas Communication Across Regions

Developed Markets:

- Emphasize low-carbon innovation (e.g., CCUS, hydrogen).
- Address greenwashing with transparent emissions data.
- Highlight gas for grid reliability and energy affordability.

Emerging & Developing Economies:

- Highlight gas for social development
- Emphasize job creation, local industry, and energy access.
- Position gas as a practical step toward an inclusive transition.

6. Public Perception and Media Narratives

Public perception and media narratives play a significant role in shaping the context within which the natural gas industry communicates its role in the energy transition.

A. Public Perception: Public opinion on natural gas and its role in the energy transition is divided. Many see it as a relatively environmentally friendly fossil fuel, especially compared to coal and oil, and view it as a "bridge fuel" to renewables. However, a growing segment questions its long-term environmental impact, with some considering it a "bridge to nowhere" that could delay the shift to renewables. In the U.S., public opinion is influenced by partisan divides: Republicans tend to support continued use of natural gas, while Democrats favor phasing out fossil fuels.

Concerns over rising consumer prices during the energy transition also shape public views, and the natural gas industry can highlight its affordability as a key communication point.

B. Media Narratives: Media coverage of climate change has surged in recent years, reflecting growing global concern. This has led to greater scrutiny of all energy sources, including natural gas, with a focus on their environmental impact and sustainability. As a result, the natural gas sector often faces negative media coverage, highlighting its contributions to greenhouse gas emissions, potential environmental damage from practices like fracking, and accusations of "greenwashing" in its environmental claims.

Some media outlets continue publishing paid content from the fossil fuel industry, sparking criticism and accusations of spreading misinformation that could hinder climate action. Regional differences also affect media coverage and public perception of natural gas, shaped by local economic factors, environmental concerns, and energy policies.

7. The Role of Different Communication Channels

Various communication channels shape the narrative around natural gas during the energy transition. Public relations (PR) is crucial for managing reputation and relationships with stakeholders. Advertising promotes natural gas’s benefits and counters negative media narratives, though it sometimes faces accusations of “greenwashing” when claims are seen as exaggerated.

Social media has become key for direct engagement, allowing natural gas companies to share updates and participate in discussions. However, if not authentic, social media efforts can also lead to greenwashing accusations. Industry reports provide data-driven insights that influence stakeholders, policymakers, and investors, helping shape the overall narrative on natural gas’s role in the transition.

8. Comparison with Other Energy Sectors (Renewables)

The communication strategies of the renewable energy sector contrast with those of natural gas in the energy transition. Renewable companies focus on the environmental benefits of their energy sources, emphasizing reduced greenhouse gas emissions, climate change mitigation, and sustainability. They also highlight economic benefits like job creation, investment opportunities, and energy independence.

Technological advances and decreasing costs in renewable energy are key messaging points, along with a strong emphasis on social media for raising awareness and engaging the public.

The main difference lies in the starting point of each sector’s communication. Renewable energy aligns with the goals of the energy transition, presenting solutions to climate change, while natural gas communication requires a more nuanced approach, often justifying its role in the transition away from fossil fuels. Although both sectors face challenges in communicating complex information, the renewable energy sector tends to benefit from a more positive public perception due to its environmental benefits.

Table 1: Comparison of Communication Strategies: Natural Gas vs. Renewables

Feature	Natural Gas Industry	Renewable Energy Sector
Messaging Focus	Promotes reliability, affordability, energy security, and innovation.	Centers on climate solutions, and sustainability.
Tone & Messaging	Defensive & explanatory	Aspirational and future-oriented
Channel Emphasis	Traditional PR, paid media, investor communications, and reports.	Heavy focus on digital campaigns, social media, and community engagement.
Public Reception	Requires robust data and transparency to shift narratives.	Receive more favorable coverage.

Recommendations

To effectively navigate the energy transition and secure a sustainable future, the natural gas industry should adopt the following recommendations for its communication strategies:

- Develop a comprehensive communication strategy that clearly articulates the natural gas industry's vision for its role in the energy transition, acknowledging both its benefits and limitations.
- Prioritize transparency and authenticity in all communication efforts, especially regarding methane emissions and environmental impacts, providing verifiable data and progress updates.
- Invest in robust stakeholder engagement programs to build trust and address concerns proactively through open dialogue and collaborative initiatives.
- Refine the “bridge fuel” narrative by providing concrete data on emissions reductions achieved through natural gas replacing coal, and outline a clear pathway towards a lower-carbon energy system where natural gas plays a specific, diminishing role alongside the growth of renewables.
- Highlight investments in and advancements of lower-emission technologies like CCUS, RNG, and hydrogen, providing concrete examples of successful projects and their impact on reducing the industry's carbon footprint.
- Tailor communication strategies to address the specific needs and concerns of different stakeholder groups, recognizing that messaging that resonates with one group may not be effective with another.
- Engage proactively with the media to provide accurate, factual information and counter negative narratives by building relationships with journalists and offering expert insights.
- Utilize social media strategically for direct engagement, education, and building a more positive image by sharing authentic content and actively responding to public concerns, while being vigilant against any perception of greenwashing.
- Collaborate with reputable research institutions and academia to produce credible and objective reports that analyze the role of natural gas in the energy transition, contributing to a more informed public discourse.
- Learn from the communication strategies of the renewable energy sector, particularly in emphasizing long-term environmental and economic benefits and engaging the public through compelling narratives and visual content.

Conclusion

Strategic communication is crucial for the natural gas industry as it adapts to the global energy transition. As environmental awareness grows and decarbonization becomes a priority, the sector must effectively communicate its value, address public concerns, and show commitment to a lower-carbon future. Strategic partnerships with renewable energy companies, tech innovators, and NGOs can also help the natural gas industry demonstrate its commitment to clean energy. Highlighting these collaborations shows a united approach, positioning the sector as part of the broader solution to global energy and climate challenges.

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