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Inside Perspective

America Speaks Up

Welcome to this third edition of The Shell Poll, an opinion survey on important issues and ideas facing America. In this issue we've asked our fellow citizens to think about the state of our nation's values at the end of the century.

As in past surveys on the schools, the workplace and the millennium, we can learn a great deal about ourselves as a nation from these results. In this case the findings are rather sobering as they show a nation deeply troubled by a decline in morals, ethics and honesty — and unsure what to do about it.

We hope this survey causes you to ask questions, to seek answers and to engage in dialogue with your friends, your family and your business associates. The Shell Poll is our contribution to national conversation that's been the basis of America's strength for more than two centuries. Our goal is to encourage you to talk with others and with us about the issues of the day.

The results of this poll do not necessarily represent the opinions of Shell Oil Company or its employees, but they are a snapshot of what a representative cross-section of Americans think about these issues. We invite you to use this information in ways that help foster constructive dialogue in your community.

We continue to be excited by the many individuals, organizations and media outlets that have contacted us about The Shell Poll. If you have comments, questions or suggestions for other issues we can explore together, please call our corporate affairs office at (713) 241-5398.

Jack E. Little

Jack E. Little
President and CEO, Shell Oil Company



Count on ShellSM
FOR INFORMATION

The Shell PollSM

Crisis of Conscience

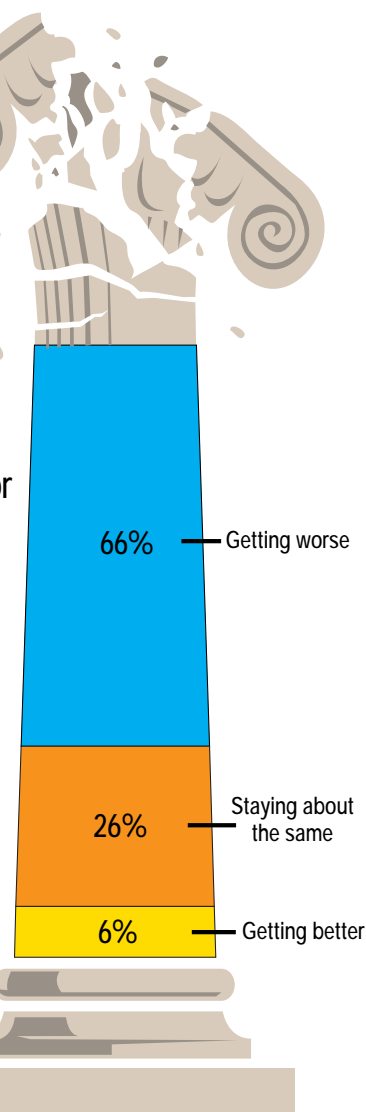
As the century draws to a close, the nation finds itself in a crisis of conscience. By an overwhelming 11-to-1 margin, those surveyed in the latest edition of The Shell Poll say society's standards for acceptable behavior are getting worse (66%) rather than better (6%). Adults over 50 (73% worse), southerners (70%), rural residents (72%), and the deeply religious (74%) register the highest levels of concern over declining standards of behavior.

When asked about a list of issues including moral values, race relations, the environment, the economy and national defense, nearly six out of 10 Americans (56%) identify moral values as the most serious problem. In fact, concern over race relations ranked a distant second at just 14 percent.

Across nearly every demographic category, the decline in moral values is a dominant American concern — and it is not just a case of a problem chosen by default by a people otherwise satisfied with the way things are going in the country. In fact, those who call moral values the worst national problem are also dissatisfied with the overall direction of the country

See Conscience on Page 2

Society's standards for acceptable behavior are getting worse.





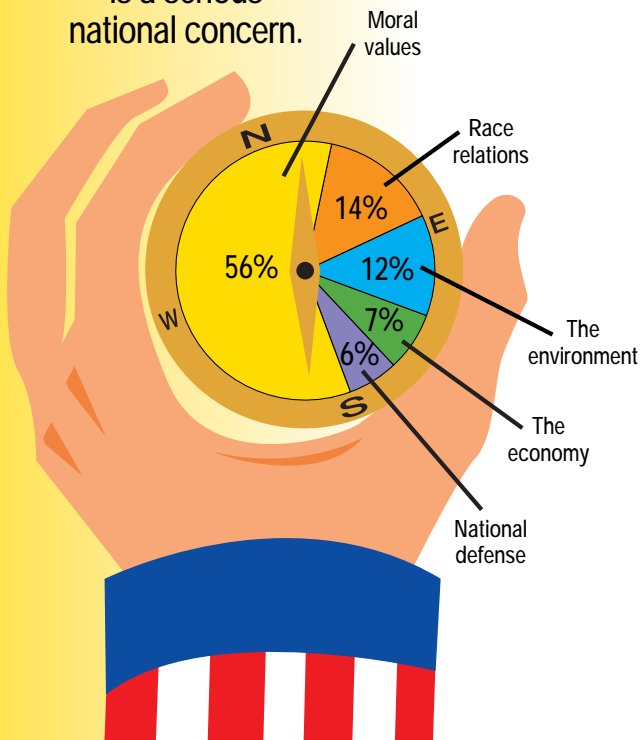
VALUES

Conscience

Continued from cover

(55% dissatisfied), while only 41 percent of those who are more concerned with other issues are dissatisfied. This suggests discontent with the nation's moral climate is very serious and deeply felt.

Moral values
is a serious
national concern.



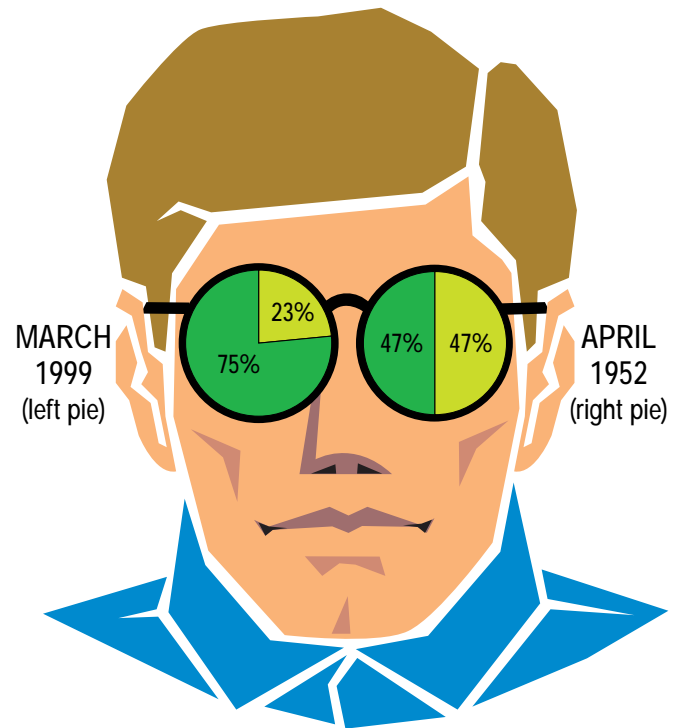
FACTOID

TV To Blame?

Nearly seven in 10 Americans (68%) over 65 say adult language and sexually explicit content on television is a very major cause of moral decline, but only 41 percent of those under age 35 feel this way.

Is there a general decline
in honesty among Americans?

True Not true



America's Endangered Values List: Respect, Responsibility, Honesty

Americans don't simply point to one or two important values they feel are eroding. When asked to assess the strength of 10 key values over the last 10 years, a majority say that the nation has become weaker on eight. These are: respect for authority, other people and the law; commitment to marriage; personal responsibility; good citizenship; the work ethic; and belief in God and religion.

Americans are split on whether concern for the less fortunate is stronger or weaker. Only on tolerance of people who are different does the public believe the country has become stronger.

Survey results suggest three key values are most endangered in America: respect, responsibility and honesty.

Respect is a bedrock American value, whether it is respect for ourselves, for others, or for society. Today, however, Americans say this precious commodity is in short supply. Large majorities feel that the nation has become weaker in



VALUES

terms of respect for other people (74%), respect for the law (77%), and respect for authority (86%).

Nothing is more central to American myth-making than rugged individualism. Horatio Alger stories, the self-made millionaire, Gary Cooper in “High Noon” — all personify our belief in personal responsibility. But today seven in 10 Americans believe a strong sense of personal responsibility is a value that has grown weaker in our society. Interestingly, among all age groups, baby boomers (77%) express the greatest concern about declining personal responsibility. People also perceive a weakening of commitment to two important manifestations of personal responsibility: the work ethic (58% say weaker) and good citizenship (59%).

Three-fourths (74%) of the public report that they are dissatisfied with the honesty and standards of behavior of people in the country today. Seventy-five percent also say there is “a general letdown in honesty among the American people as a whole.” By comparison, only 47 percent felt there had been such a letdown when this question was asked in a 1952 Opinion Research Corporation poll. The perception of widespread dishonesty also seems to be taking a toll on people’s trust in one another. Just 39 percent agree with the statement, “Most people can be trusted,” but nearly 60 percent agree with the statement, “You can’t be too careful dealing with people.”

Biggest Concerns

When asked which one or two problems regarding moral values concerns them most, nearly 40 percent of the public say “a tendency to blame others instead of taking personal responsibility.” “A lack of respect for others” is second at 30 percent.

Conflicting Values

America as a whole might be suffering a crisis of conscience, but when it comes to passing moral judgement on individuals, we see conflicting values.

In fact, Americans’ belief that there is a serious lack of personal responsibility in the country today might be viewed as something of a self-indictment. By almost 2-to-1, Americans agree with the statement “society needs to punish those who do wrong” (53%) rather than “society needs to show forgiveness for those who do wrong” (28%). But a majority (53%) also agree that “I don’t judge other people’s personal morality if it doesn’t affect me.”

A majority (54%) agree that “there are absolute standards of right and wrong for everyone,” but there is also relatively strong support (40%) for the belief “each person has to determine what is right and wrong individually.”

Finally, Americans are split on the question of tolerance. Neither the statement “it’s important to show tolerance toward those who are different” (47%) nor the belief “it’s important to show respect for the standards of the community” (41%) are able to garner a majority.



A tendency to blame others instead of taking personal responsibility

39%

A lack of respect for other people

30%

Too much focus on money and materialism

28%

Lower standards of honesty and integrity

24%

More permissive sexual attitudes

15%

All of these

14%

FACTOID

Tolerance Knows No Boundaries

The sense that the country is too tolerant is shared broadly among the public — by Democrats (61%) as well as Republicans (78%), by both the young (65%) and the old (69%), and by both men (64%) and women (69%).



MORAL ISSUES

Power of the Family

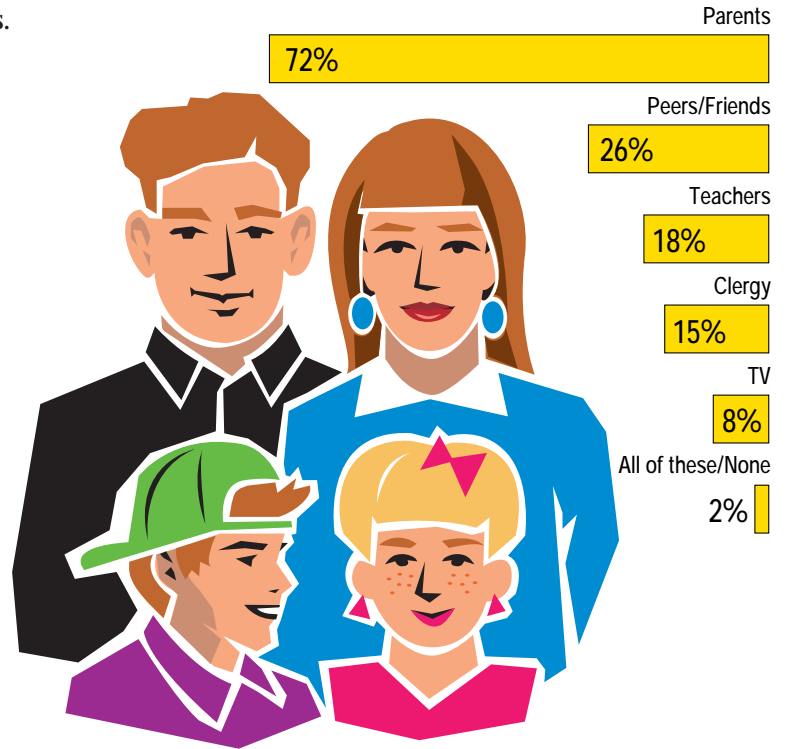
Americans clearly believe the family unit must do a better job of setting and enforcing moral standards. In fact, 47 percent say the example parents set for their children is a greater problem in our society than standards set by public officials (16%) or the portrayal of life and values on TV and in the movies (33%).

However, they register tremendous faith in families' potential to improve the country's morality: seventy-two percent of Americans say parents have the greatest chance of positively shaping children's moral development — far more than peers and friends (26%), teachers (18%), religious officials (15%) and television (8%).

Sixty-five percent say families must take the lead in improving moral standards, far outranking religious institutions, the media, schools and government.

What is most helpful in leading a moral life? Forty-three percent say it is having respect for God. Self-respect is cited by 31 percent, and respect for others is chosen by 23 percent.

What has the most potential to create a positive effect on a child's moral and ethical standards?



FACTOID

Love and Marriage

More than eight out of 10 Americans believe that commitment to marriage has become a weaker national value — including fully half who say it has become much weaker. This sentiment is shared both by those who are married (80%) and by those who are single or divorced (87%).

Three out of four Americans (74%) say wives can be trusted to do what's right for their husbands all or most of the time, compared to just 58 percent who say husbands can be trusted to do right by their wives. Among women, trust of husbands is even a couple of percentage points lower (55%), and men are regarded even more harshly by single women (30%) or divorced women (21%).

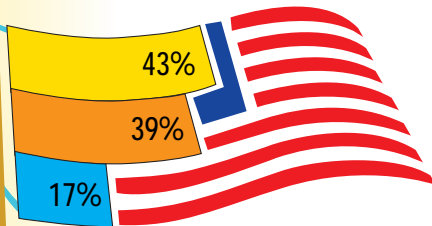
What is the most important thing in helping people live a moral life?





M O R A L I S S U E S

Which would
do more to raise
America's standards?

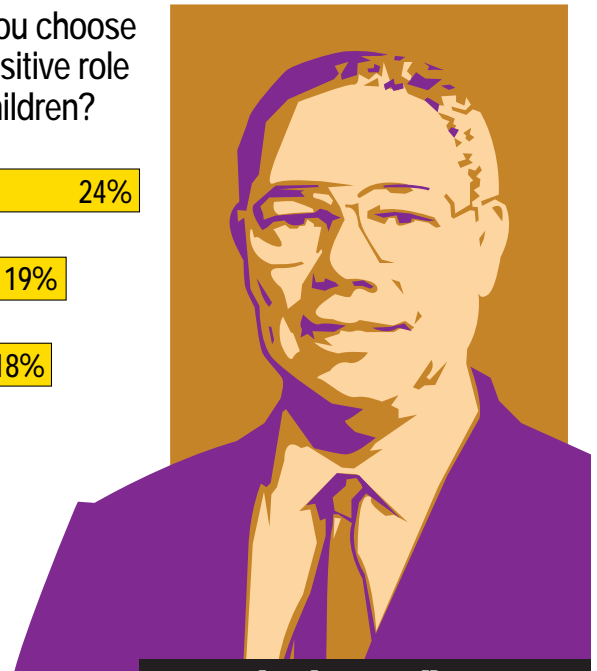
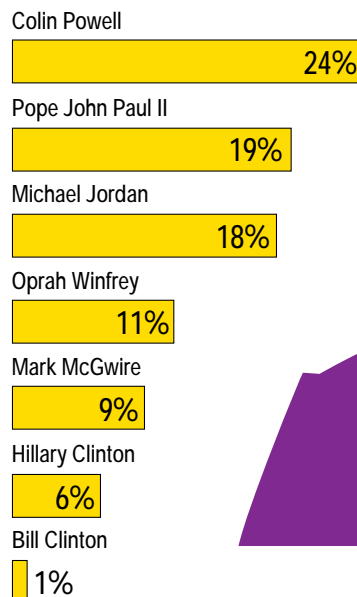


- If more people attended religious services regularly
- If TV and movies contained less sex and violence
- Both/Neither

Asked to compare the effect on moral standards of more people attending religious services and less sex and violence on television, Americans found the two nearly equal. Forty-three percent say morals would be improved through regular church attendance by more people, while 39 percent choose the portrayal of less sex and violence on television and in the movies.

Americans don't dismiss the importance of role models other than parents in shaping a child's character. Nine out of 10 say it is important for children to see good role models. When asked whom they would choose from a list as the most positive role model for children, retired general Colin Powell was first, chosen by nearly 25 percent. Just 1 percent chose President Bill Clinton.

Whom would you choose
as the most positive role
model for children?



General Colin Powell
— A great role model for kids



GENERATIONAL VALUES

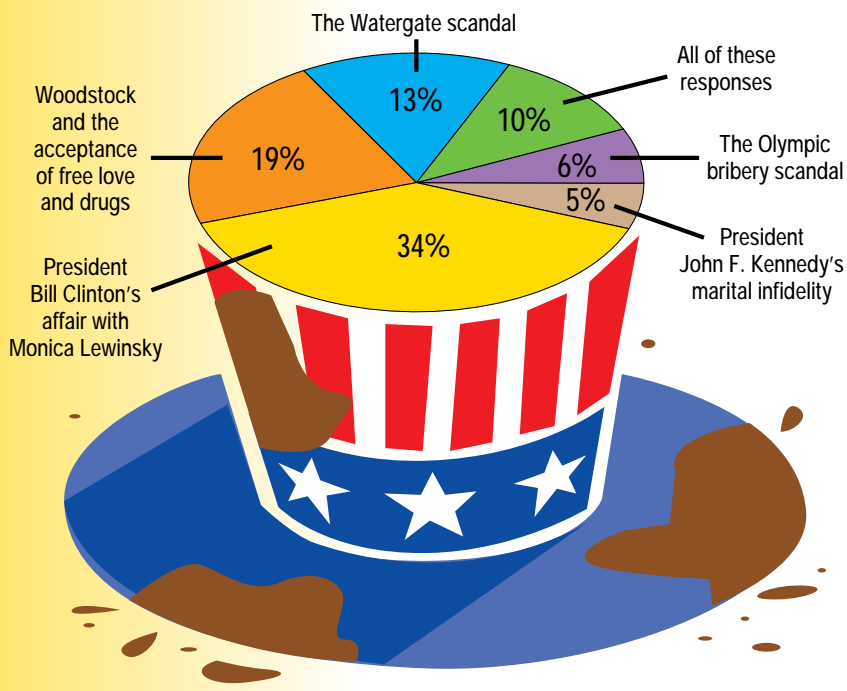
A Moral Generation Gap?

It is not surprising that opinions differ between generations when looking at specific aspects of morals and values. Generation X has a much stronger streak of independence and belief in individuality as they

evaluate moral values, whereas older Americans are more traditional and “by the book.” The following table indicates the percentage who agreed with a statement about morals and values.

Age of respondents	18-34	35-49	50+
Others' morality is important to me in terms of what I think of them	35%	41%	49%
I don't judge other people	62%	53%	44%
Society needs to encourage self-reliance	36%	44%	41%
Society needs to help those in need	52%	43%	38%
I have traditional views about sexual morality	55%	60%	73%
I have modern views about sexual morality	42%	36%	19%
There are absolute standards of right and wrong	44%	58%	61%
Each person must determine what is right for him or her	52%	35%	32%
Most people can be trusted	30%	43%	44%
You can't be too careful in dealing with people	68%	54%	51%

Which one of these events most represents America's declining morality?



FACTOID

Litmus Test

A majority of Republicans (56%) say “other people’s morality is very important to me in terms of what I think of them,” compared to only 32 percent of Democrats.

Nearly two-thirds of Democrats (64%) and only 38 percent of Republicans agree with the statement, “I don’t judge other people’s morality if it doesn’t affect me.”



GENERATIONAL VALUES

A Lost Generation?

The nation's young people, more than any other generation, are bombarded with images that influence their values and morals. Television, the Internet, music, movies — all are at their fingertips and have an impact on their values.

Do young people have as strong a sense of right and wrong as they did 50 years ago? Eighty-two percent of Americans say they don't. When Ben Gaffin and Associates posed the same question in 1952, only 34 percent said young people's values had declined from 50 years earlier.

Who or what is to blame? Americans point a finger of blame at the institution of the family — significantly more than explicit music lyrics or television content — as the cause of the decline in moral values today.

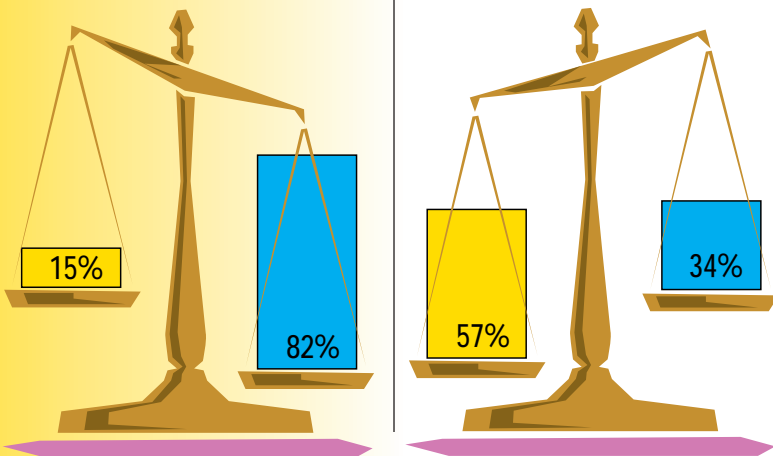
More than all other potential explanations, families not teaching children good values (88%) is pointed to as a major cause of the decline in moral values. The rise in drug abuse follows closely behind parenting as a leading source of moral decay, with 83 percent identifying it as a major cause.

Do young people today have as strong a sense of right and wrong as they did fifty years ago?

Yes No

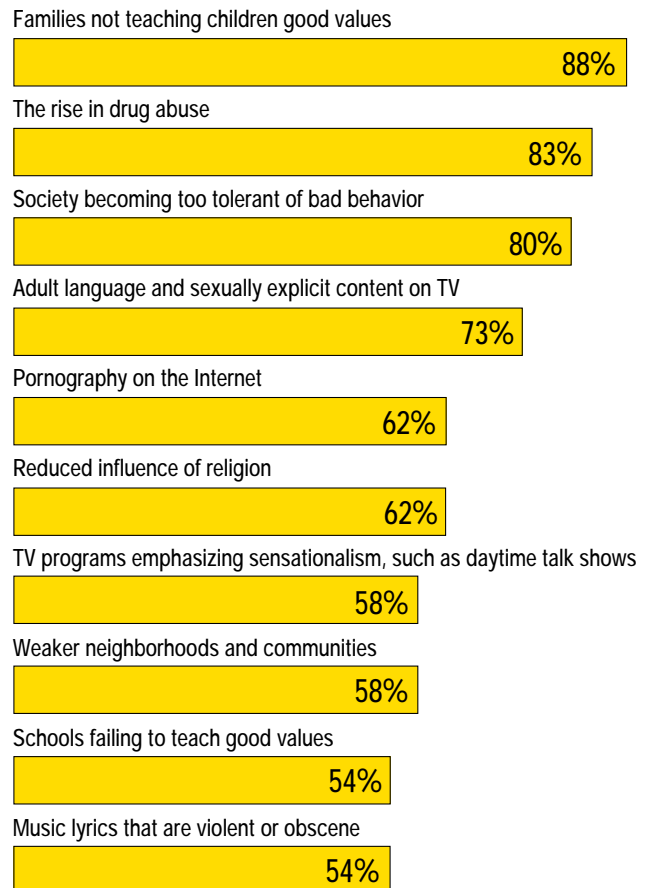
MARCH 1999

JUNE 1952



How would you rate each item as a cause of moral decline in America?

Very major cause or fairly major cause





PRIVACY

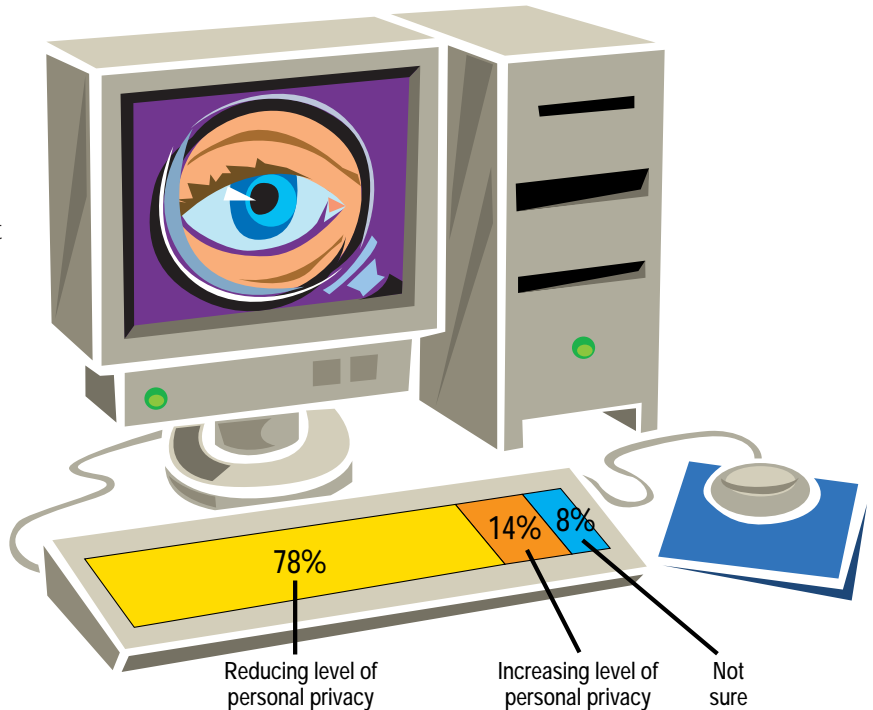
Privacy in Retreat

Americans today feel they are faced with many major invasions of privacy and, in many cases, they blame the use of technology.

Nearly 80 percent of adults say the increasing use of computers and the Internet is reducing our level of personal privacy. Only 14 percent think this rise in computer and Internet use is actually increasing people's level of personal privacy.

But computers and the Internet are not Americans' only concerns when it comes to privacy. Asked about various other practices, people are most concerned about the effect on privacy of business and government collecting and sharing sensitive information about individuals. Credit bureau, commercial business and government driver's license bureau use of such information is viewed as a major invasion of privacy by about three out of four Americans.

Are the use of computers and the Internet increasing or reducing your level of personal privacy?



How significant an invasion of privacy are these items?

Major invasion of privacy

Credit bureaus accumulating and selling financial information about people

80%

Companies selling information about their customers to other companies

77%

States selling their driver's license lists to security companies

76%

People using police scanners to eavesdrop on calls made on cellular phones

66%

Health insurance companies sharing medical records with other companies

65%

People having to give their social security number as a standard form of I.D.

53%

Use of hidden security cameras in workplaces

43%

Employers monitoring employees' telephone calls with customers

37%

Cameras on roads/highways that record license plates of drivers who speed

17%

Two out of three say the sharing of medical records by health insurance companies is also a major invasion of privacy.

Using police scanners to eavesdrop on cellular phone calls is considered a major invasion of privacy by two-thirds.

When it comes to the workplace, Americans might have become accustomed to a lack of privacy. Hidden cameras in the workplace and monitoring of employees' telephone calls with customers are seen as major invasions of privacy by less than half. In fact, Americans are evenly divided as to whether monitoring calls is a major or minor invasion of privacy.

The public is willing to accept the use of cameras on roadways to catch speeders or other traffic violators. Only 17 percent say this practice is a major concern, while 44 percent say it is not really an invasion of privacy. However, by exactly 2-to-1, more men (22%) say that this is a major invasion of privacy than do women (11%).



ETHICS

Medical Ethics

While strides in medical technology are improving Americans' life spans and quality of life, they also are creating ethical dilemmas. The public draws interesting distinctions between what is and is not ethical.

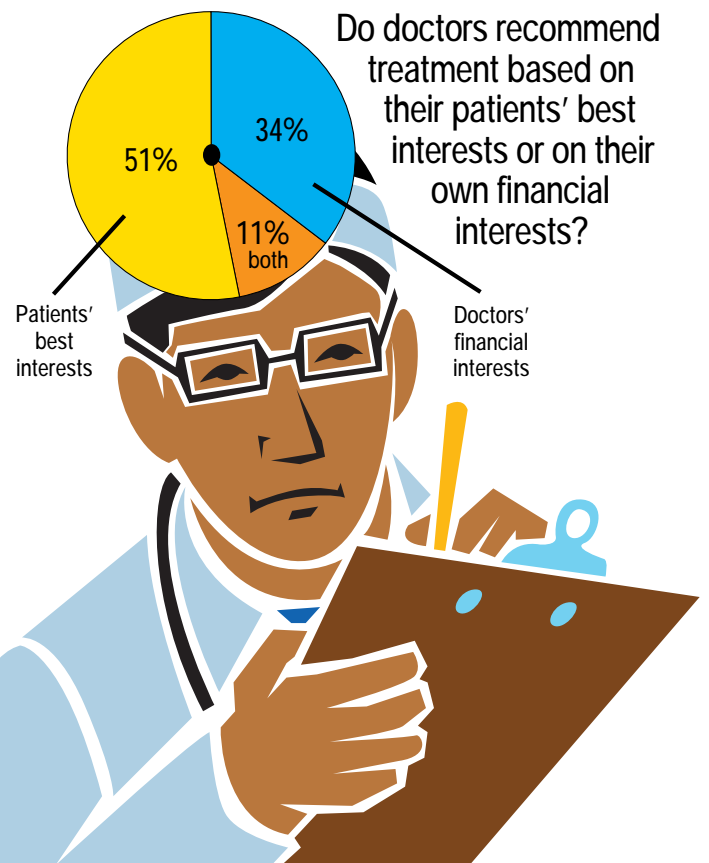
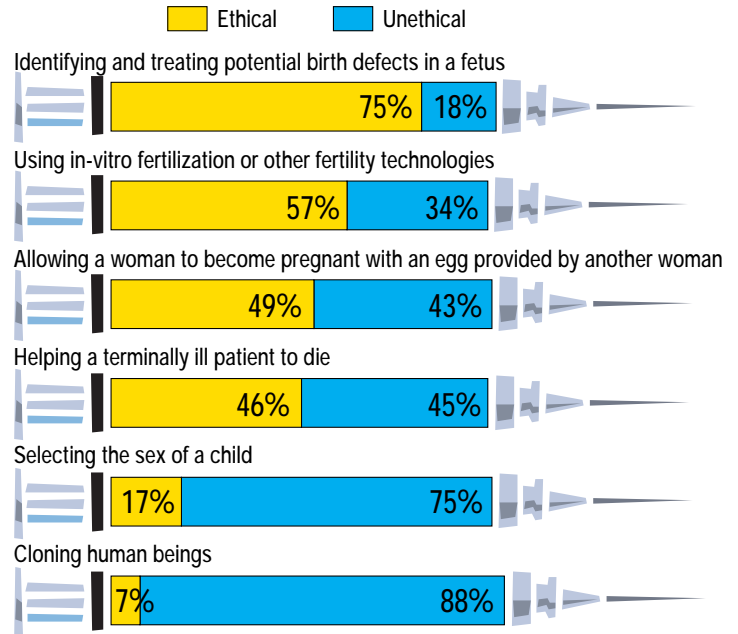
Americans overwhelmingly view cloning human beings as an unethical use of medical technology (88%) but are divided on the ethics of other health issues — including using technology to help end a terminally ill patient's life.

Significantly, the only age group that gives majority support to euthanasia is made up of adults ages 35 to 49. Racial differences emerge on the issue of euthanasia. Half of whites say euthanasia is an ethical practice, but only one-third of African Americans and 30 percent of Hispanics agree.

The biggest differences among subgroups arise from religious beliefs. Eighty percent of Americans who say religion is the single most important aspect of life consider euthanasia unethical. Only 27 percent of those who say religion is somewhat or not important view euthanasia as unethical.

These groups also split almost evenly over allowing a woman to become pregnant with an egg donated by another woman. While 57 percent of those who say religion is the single most important aspect believe this practice is unethical, 60 percent of those who say religion is somewhat or not important say it is ethical.

Are the following uses of medical technology ethical or unethical?



FACTOID

Dr. Trustworthy

There's a racial gap in the level of trust toward doctors. While a majority (51%) of African Americans trust doctors to do what's right for their patients all or most of the time, their support is not nearly as strong as that of whites (68%).

Nearly half (49%) of African Americans believe doctors are looking out mainly for their own financial interests.



TOLERANCE AND INTEGRITY

Too Tolerant?

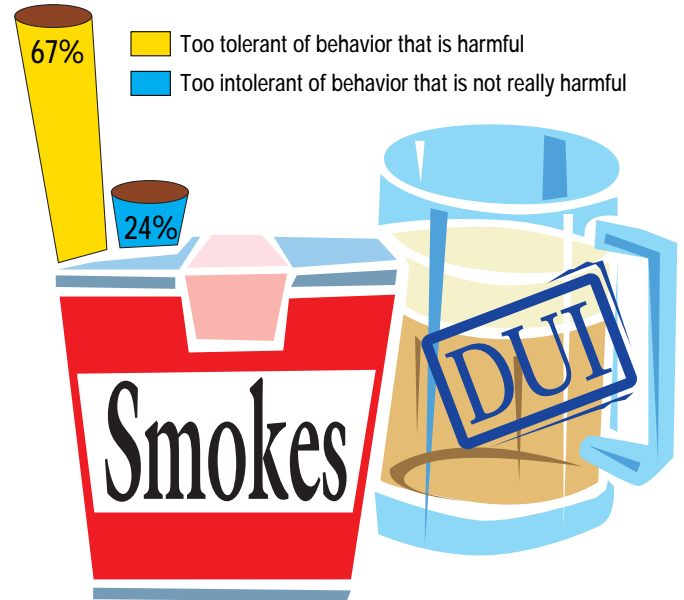
Has America become too tolerant for its own good? Consider these findings.

Fully two-thirds (67%) of the public feel that society is too tolerant of harmful behavior today, while only 24 percent say the bigger problem is intolerance of behavior that is not really harmful. This sense that the country is “too tolerant” is shared broadly among the public — by Democrats (61%) as well as Republicans (78%), by both the young (65%) and the old (69%), and by both men (64%) and women (69%).

Eight in 10 adults think that a major cause of moral decline is “society becoming too tolerant of bad behavior” (including 49% who say it is a very major cause).

Rather than becoming more committed to high moral standards (45%), a 48 percent plurality report that they have become more accepting of others’ moral shortcomings as they have gotten older.

Is society too tolerant of harmful behavior or too intolerant of behavior that is not really harmful?



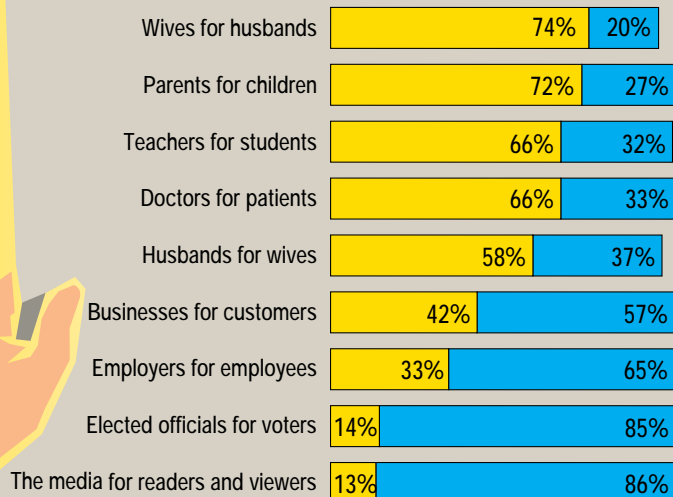
50¢ The Daily News

MAY 3RD 1999

It's All About Trust

Can the following be trusted to do what's right?

All or most of the time
Just some or very little of the time



FACTOID

Whose Standards Are Higher?

While nearly half (49%) say their own standards of honesty and integrity are about the same as those of their spouse, fully a third (35%) say their spouse has higher standards. Only a quarter say their boss has higher standards and over a third (36%) say he or she has lower standards than their own.

Americans are apparently casting a suspicious eye on many of their neighbors. Forty-three percent say their own standards for integrity are about the same as those who live around them. However, only 12 percent believe their neighbors are more honest, while 30 percent — the second highest number after the boss — say their neighbors are less honest than themselves.

By far, people look up to their own parents more than any other group. Nearly half (49%) say their parents have higher standards than they do, with just 11 percent saying their own standards are higher.



PUBLIC VALUES

Politicians and the Media

The modern media spend much time and effort covering the moral shortcomings of political figures, but survey findings suggest the public is just as concerned about the media itself.

Only 13 percent of Americans believe that the media can be trusted to do what is right for the audience all or most of the time, while 86 percent say that the media can be trusted very little or just some of the time. That's a nearly identical level of public trust that politicians receive (14% all or most of the time; 85% just some or very little).



In fact, Americans believe that elected officials' bad reputations today are more a reflection of their lives being on public display (66%) than an indication that their moral standards are actually lower than other people's (23%).

While political candidates often try to appeal to voters' concern about moral decline, Americans are not necessarily looking to politicians to solve the nation's moral problems. The public is not nearly as offended by the idea that elected officials are not working to improve the country's moral standards (20%) as by elected officials "being hypocritical by talking about values that they don't personally live by" (75%).

When Americans think about the forces in society that contribute to lower moral standards, many point the finger at mass media. One-half (50%) of the public believe that adult language and explicit sexual content on television is a very major cause of moral decline. Among those who see this as a particularly serious issue are African Americans (68% major cause), senior citizens (68%) and born-again Christians (68%).

The public also feels that pornography on the Internet (62%) is a major cause of moral decline. Women (57%) see this problem as much worse than do men (37%). Violent or obscene music lyrics (32% very major cause), however, are seen as a lesser cause of the nation's moral problems. Seniors (46%) express real concern over such music, but younger Americans (20%) do not.

Which bothers you more about elected officials and moral values?

-  Elected officials not working to improve the country's moral values
-  Elected officials being hypocritical





BUSINESS VALUES

Doing Good Work?

While the economy thrives and most businesses boom, Americans are less convinced business is performing well in its responsibilities to society.

A majority of Americans say that businesses are doing an excellent or good job when it comes to providing a good return to investors (52%) and providing quality products and services to customers (52%). But businesses are found lacking in other areas. Americans say businesses are doing just a fair or poor job “sharing profits with employees” (73%), “protecting the environment” (70%), “having ethical business practices” (63%) and “contributing to the local community” (59%).

Interestingly, more men than women think businesses are doing a better job upholding these values. The only exception is business’ contribution to the local community: 41 percent of women say businesses are doing an excellent or good job, while only 36 percent of men agree.

In addition, a racial division regarding corporate responsibility emerges. African Americans and Hispanics are much less likely to say businesses are doing an excellent or good job contributing to their local community (22% Africans Americans; 28% Hispanics) than whites (42%). In addition, whites are much more likely to say businesses are doing an excellent or good job providing a good return to investors (56%) than African Americans (31%).

What the Public Expects From Business

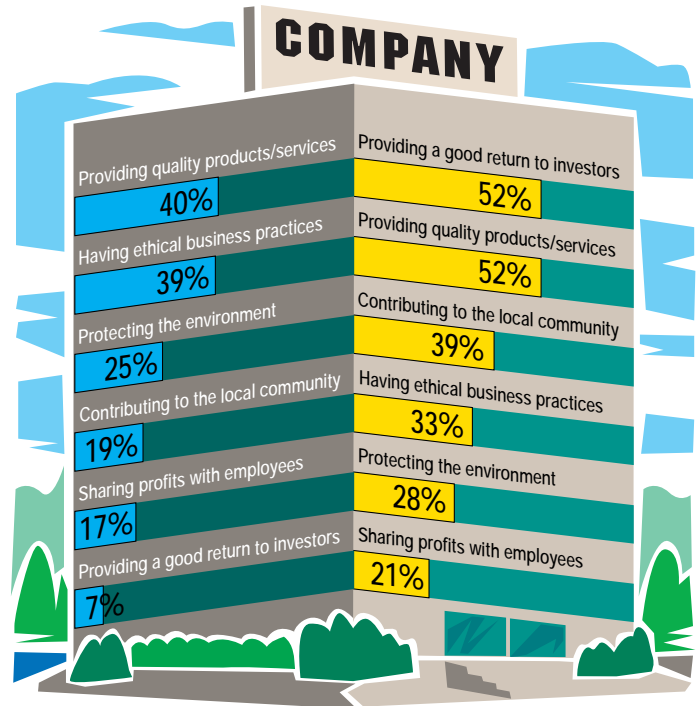
Fortunately for businesses, among these values, 40 percent of adults think that providing quality products and services is the most important value for businesses to uphold, ranking it as number one on the list.

Which are the most important values for businesses to uphold?

Respondents indicate most important values

How good a job are businesses doing at upholding these values?

Respondents indicate excellent or good



However, almost the same percent say it’s important for businesses to uphold ethical business practices. Protecting the environment is third at 25 percent, and contributing to the local community is a priority for 19 percent. On the other hand, sharing profits with employees is a priority for just 17 percent and providing a good return to investors is at the bottom of the business values priority list (7%).

About The Shell PollSM

Shell sponsors The Shell Poll as a way to foster dialogue among Americans about substantive issues, values and lifestyles. The poll is an extension of the company’s “Count on ShellSM” campaign to provide reliable and accurate information to consumers. Future surveys will explore other public policy issues, trends and topics raised by Shell customers and the general public. For more information or to suggest a topic for future polls, please call Suzy Ginsburg at 713-241-5398 or email sginsburg@shellus.com. To see the full results of this poll, go to http://www.countonshell.com/shell_poll.html.

The Shell PollSM is conducted by the Washington, D.C.-based survey research firm Peter D. Hart Research Associates. Telephone interviews were conducted March 16–20, 1999 by trained interviewers. The survey results are based upon interviews with a representative national sample of 1,277 randomly selected adults aged 18 and over. Question results for the entire general public sample have a margin of error of +/-2.8 percent.