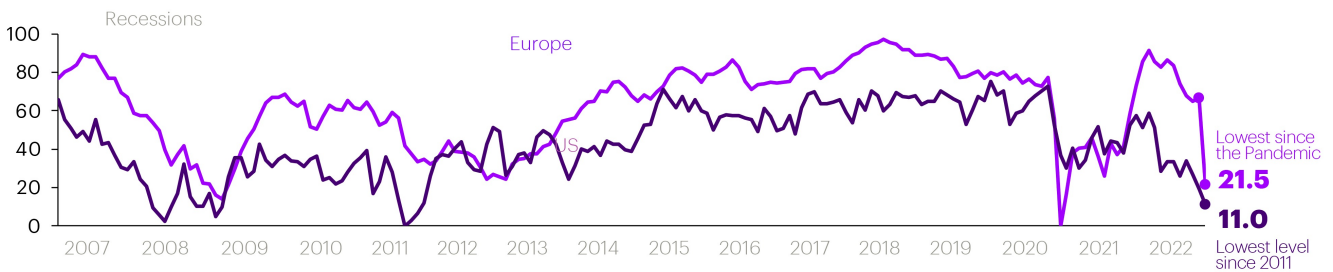


The war in Ukraine: A moment of reckoning for the oil and gas industry



Energy cost impacts: Consumer spending

Expected consumer sentiment: Europe and US (Jan 2007—Mar 2022 - Status as end of March 2022)



Sources: Accenture Research analysis of [European Commission Consumer Sentiment Survey for EU](#) and [University of Michigan, Survey Research Center, Surveys of Consumers](#). US survey re-baselined from 100 to 0.