

Minority and Female Employment: Regional Forecasts for the Oil & Gas and Petrochemical Industries

Prepared for the American Petroleum Institute, API

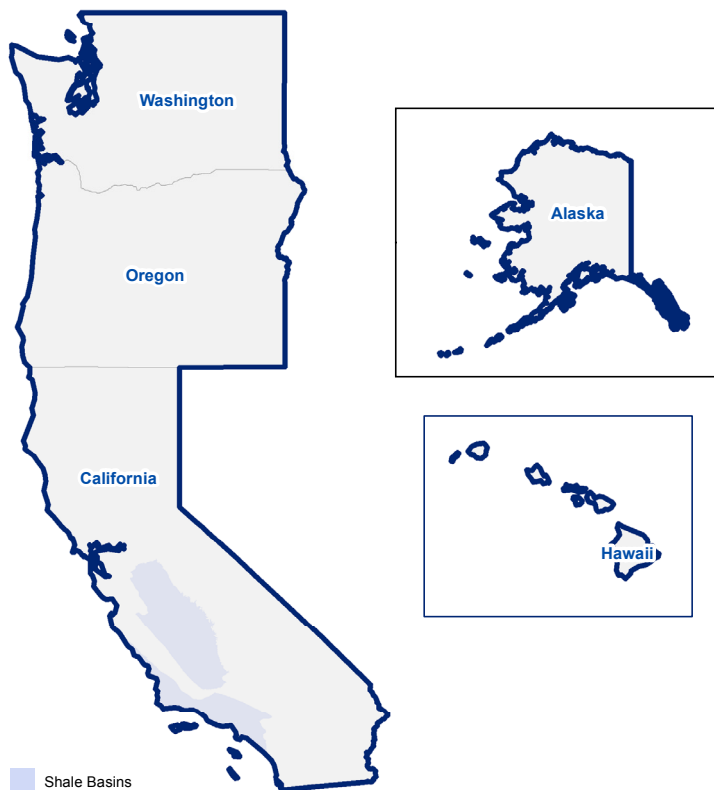
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This report projects direct job opportunities in the oil & natural gas and petrochemical industries through 2030 across the nine U.S. Census regions. It is a supplement to the recently released IHS report on minority and female employment in these industries.

KEY FINDINGS

- **The Pacific region** is projected to have more than **113,000 direct job opportunities** through 2030.
- Blue collar occupations, including skilled and semi-skilled, are projected to make up **60% of employment opportunities** in the region.
- The job opportunities in the Pacific region are spread across all industry segments, with the upstream sector accounting for the most **opportunities at 87,000 jobs**.
- The share of minority employment in the Pacific region is **projected to grow** through 2030.



113,312

Projected Job Opportunities

by 2030 in the oil and natural gas and petrochemicals industries in the Pacific region.



Job Opportunities by Occupation

The study looks at employment in eight broad occupation categories. The pie chart at right shows how the job opportunities in the Pacific region are split between these occupation categories.

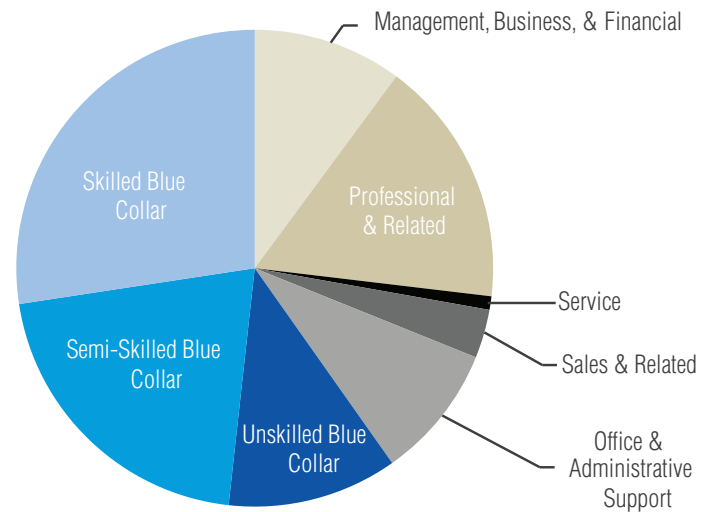
These results show:

- Blue collar occupations, most of which will be skilled and semi-skilled, are projected to make up **60% of employment opportunities**. This suggests tremendous opportunity for workers with a high-school diploma and some post-secondary training.
- There are also significant opportunities in management and professional jobs, which make up **27% of the job opportunities** projected in the Pacific region. These jobs require training in fields such as engineering, geoscience, management, business and finance, and as technicians.

Job Opportunities by Segment

The upstream sector accounts for the largest share of job opportunities projected in the Pacific region—**87,000 jobs**, or **77% of total job opportunities** in the region. This is higher than the share of upstream opportunities across the U.S. as a whole, where the upstream sector accounts for 63% of total opportunities. The above-average share of upstream employment projected in the Pacific region is due in part to the large number of opportunities projected in the region from **pro-development policies**, which assume commencement of leasing, drilling, and development activity in the Pacific OCS, Alaska National Wildlife Refuge (ANWR), Alaska National Petroleum Reserve, and Alaska offshore.

This study does not include job opportunities derived from development of the Monterey Shale; if the Monterey Shale were to be developed, it would significantly increase employment opportunities in the Pacific region. The Western States Petroleum Association (WSPA) notes that development of the Monterey Shale could have significant positive impacts, including as many as 195,000 direct and local new jobs.



Job Opportunities for Minority and Female Workers

There are significant opportunities for minority and female workers in the oil & gas and petrochemical industries—these groups represent a critically vital and available talent pool to help meet the demands of the projected growth and expansion.

The Pacific region is projected to account for an above-average share of minority employment opportunities, with African American and Hispanic workers filling **over 44,000 jobs**, or nearly **40% of total opportunities** in the region. The Pacific region also ranks second in share of job opportunities for women—**10% of the total U.S. job opportunities** projected to be filled by women are in the Pacific region.

The job estimates presented in this report for African American, Hispanic, and female workers are based on current and projected trends in factors such as labor force participation rates and educational attainment. As such, these **job projections should not be viewed as a ceiling**. As interest and training are directed to women and minority groups, they will be competitive for the more than **113,000 job opportunities** in this region.