At the end of 2021 and beginning of 2022, we circulated a cross sectional survey via social media platforms and through word of mouth. In total, 1,649 workers completed the survey. While responses revealed shared themes, such as the desire for employment stability, workers who participated in the survey were not a monolith. Workers expressed unique and individual views specific to their career and life experiences, oftentimes revealing contradictions that all humans possess. No one is perfectly consistent and respondents to this survey are no different in that regard. One recurring theme, however, emerged. Workers expressed gratitude for the opportunity to say their piece to a larger audience. As one survey respondent said, “I wish people knew our stories.”

Our survey included 38 questions aimed at oil and gas workers throughout the United States. In preparing the survey, we consulted with former American oil and gas workers that compelled us to include additional questions regarding workplace safety practices. We also cast a wider net inviting workers beyond upstream jobs (exploration and production) and included midstream (transportation and construction) and downstream (refinery and chemical) workers.

The survey aimed to understand workers’ views in three key areas:
1. Job stability and satisfaction
2. Safety practices
3. Alternative employment/industries.

Of the 1,649 survey respondents, 629 workers identified as working in oil and gas exploration and production (upstream); 665 workers identified as working in oil and gas support activities (including transportation, shipping or pipelines); 218 workers identified as working refining and petrochemical; and 123 workers identified as “other.”
JOB SECURITY
• Over half of the survey respondents have lost their jobs at least once previously to 2020, evidence that the oil and gas industry has already been systematically reducing its workforce.
• More than half of the survey respondents lost their jobs in 2020.
• Workers expressed anxiety about not being able to do anything else outside of the oil and gas industry and a preference for work that utilized existing competencies.

PAY & BENEFITS
• Average wages in the oil and gas industry have declined. Workers complained about having been fired and then re-hired for the same work at lower pay.
• Just under a quarter of survey respondents are 1099 independent contractors.
• Wages in emerging alternative energy industries are not competitive enough to attract oil and gas workers.

SAFETY AND WORKING CONDITIONS
• Just under half of survey respondents believe that their company’s safety program was explicitly or implicitly designed to shift liability of an accident onto the worker.
• A third of survey respondents indicated that they had been ordered to engage in unsafe working practices that were in direct violation of established safety practices.
• Crew sizes are shrinking with more work expected of each worker. Smaller upstream operators appear to be under staffed intentionally to save money.
• Newer, younger hires are not being trained adequately.

FUTURE OPPORTUNITIES
• Many workers expressed deep distrust of the government, but also acknowledged a potential role for certain agencies. If oil and gas companies do not rehire workers to previous levels, then many respondents said that the government should provide wage replacement (37%), health insurance benefits (35%), and fund training for workers to find new employment (42%).
• Certain geographic regions expressed a greater interest in renewable energy. For example, Gulf of Mexico regional respondents demonstrated a greater interest in offshore wind.
• Over half of workers supported a federal jobs guarantee defined in the survey as a guaranteed public job in infrastructure repair and other public good projects with baseline benefits of health insurance, paid sick leave/vacation, and retirement.
• Just under half of workers supported direct federal employment to plug oil and gas wells.

Compared to oil and gas employment data, the survey tells a story of a workforce already in transition. All segments of the oil and gas industry have learned to do more with less. Each worker’s individual productivity has skyrocketed, as more and more products are being extracted, transported, and processed with fewer and fewer workers. As the directional driller, “Archer” put it, “in the long run these crews drill themselves out of work.” Workers complained that current trends places greater pressure on remaining, smaller crews and compounds the risk each worker must face each shift.

Survey responses reveal that workers know what needs to be done to improve current conditions: increase the size of crews, provide more comprehensive training to newer hires, decrease length of shifts and increase time between shifts, and improve oversight. Workers know what will attract them to other industries: better pay, full time contracts with benefits, job security, and paid training linked to actual jobs on the other side. American oil and gas workers know that their skills are transferrable, but businesses and the government have to be better at putting those skills to work.

Workers also acknowledge that an energy transition, at least in part, is underway. Survey respondents expressed support of American energy security whatever form that energy takes. As one Texas upstream worker put it, “the transition away from O&G needs to be planned and managed so as to happen smoothly over the next 20 to 50 years.” Who will be in charge of that transition and where benefits will flow has yet to be determined.

Below are results of the survey presented without context or analysis.
What best describes the oil and gas sector that you work in?

- Oil & Gas Upstream: 38.5% (629)
- Oil & Gas Midstream: 40.7% (665)
- Oil & Gas Downstream: 13.3% (218)
- Other: 7.5% (123)

What best describes the work you do?

- Oilfield Transport: 27.8% (454)
- Owner / Management: 3.7% (61)
- Desk (Engineer, Geologist, etc): 9.5% (253)
- Oilfield (Derrickhand, Operators, Roustabout, Mudman, Welder, etc): 43.5% (712)
- Other: 15.5% (155)
Have you been let go (at any point) prior to 2020 lockdowns?

- No: 46.9% (766)
- Yes, once: 35.4% (578)
- Yes, more than once: 17.8% (291)

Have you been let go because of the 2020 lockdowns?

- No: 53.7% (878)
- Yes: 46.3% (757)

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What is your current employment status?

- Full-Time O&G: 52.5%
- Unrelated Labor: 8.5%
- Contractor in O&G: 22.2%
- Unemployed: 10.3%
- Other: 6.5%

In your current (or most recent) job, DO YOU HAVE THE FOLLOWING BENEFIT?

- Health Insurance: 74%
- Disability Insurance: 46%
- Paid Time Off / Sick Leave: 58%
- Retirement Benefits: 56%
- Training and accreditations paid for by employer: 44%
- None: 9%
In your current (or most recent) job, how do you feel about your job security?

- 38% of 622 respondents rated their job security as 7 or above on a scale of 1 to 10, indicating a relatively high level of job security.
- 62% of 1013 respondents rated their job security as 8 or above, showing an even higher level of job satisfaction.

Respondents were asked to rate on a scale of 1 (not good) to 10 (very good).

In your current (or most recent) job, how do you feel about your pay?

- 37% of 613 respondents rated their pay as 6 or above, which is somewhat positive.
- 63% of 1022 respondents rated their pay as 7 or above, indicating a high level of satisfaction with their pay.

Respondents were asked to rate on a scale of 1 (not good) to 10 (very good).
In your current (or most recent) job, **HOW DO YOU FEEL ABOUT WORKLOAD & HOURS?**

33%  
532 Respondents

67%  
1104 Respondents

Respondents were asked to rate on a scale of 1 (not good) to 10 (very good)

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In your current (or most recent) job, **HOW DO YOU FEEL ABOUT BENEFITS?**

35%  
569 Respondents

65%  
1066 Respondents

Respondents were asked to rate on a scale of 1 (not good) to 10 (very good)

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In your current (or most recent) job,
HOW DO YOU FEEL ABOUT YOUR EMPLOYER?

In your current (or most recent) job,
HOW DO YOU FEEL ABOUT YOUR MANAGEMENT?
How well does your company’s safety program keep workers safe?

- Keep workers safe: 41.9%
- Neither: 8.0%
- Don’t Know: 4.5%
- Shift liability onto worker: 22.1%
- Both: 23.5%

How secure would you be in raising workplace safety issues with your management, should an issue arise?

- Very Comfortable: 36.3%
- Somewhat Comfortable: 31.4%
- Somewhat Nervous: 19.8%
- Very Nervous: 8.9%
- Don’t Know: 3.7%
Have you ever been ordered to engage in unsafe working practices that were against established safety protocols?

- Yes, on one occasion: 365 (22.3%)
- Yes, on multiple occasions: 222 (13.6%)
- No: 1047 (64.1%)

Did anyone threaten to terminate your employment or discipline you if you did not engage in the unsafe working practice?

- Not Applicable: 1104 (67.0%)
- Yes: 282 (17.1%)
- No: 262 (15.9%)
In considering moving to a new job outside of the oil and gas industry, please rank what is most important to you.

- Pay: 36.9%
- Health and safety conditions: 22.3%
- Similar location: 8.6%
- Similar work schedule (hours on days on/off): 13.5%
- Skills required of new job: 8.2%
- Job security (contract length): 7.1%
- Benefits: 3.3%

We asked respondents to rank each each category.
How do you feel about your current (or most recent) employer’s implementation of these safety protocols?

- Routine and mandatory safety courses paid for by your employer: 36% negative, 64% positive.
- Routine and mandatory maintenance of equipment and gear: 29% negative, 71% positive.
- Employer provided personal protective equipment: 26% negative, 74% positive.
- Testing for Naturally Occurring Radioactive Material (NORM) exposure: 34% negative, 66% positive.
- First aid and medical response: 27% negative, 66% positive.
- Evacuation procedures in case of extreme weather or emergency: 28% negative, 72% positive.

If you could receive free training or education to help you move to a new part of the energy sector, what education or skills training would you be interested in?

- Well Plugging: 34% interest.
- Pipeline Removal: 30% interest.
- Electrical and construction: 27% interest.
- Utility-scale solar: 26% interest.
- Decommissioning: 25% interest.
- Rig: 23% interest.
- Onshore and offshore wind: 22% interest.
- Public transport construction: 22% interest.
- Battery storage technologies: 22% interest.
- Geothermal technologies: 22% interest.
- Other sectors: 17% interest.
- Nuclear: 15% interest.

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Which of the following government measures to support oil and gas workers would you be interested in? Select all that apply.

- Federal Job Guarantee: 51%
- Direct Federal Government employment to plug oil & gas wells: 47%
- Paid training for industry crossover to new field: 42%
- Wage replacement if laid off: 37%
- Paid health benefit extension: 35%
- Pension guarantees: 30%
- Glide path to retirement (or wage reposearint retirement if 60-64): 24%

In addition to regional movements, in recent years it takes considerably fewer workers to produce more oil and gas.

U.S. RIG COUNT, EMPLOYMENT, AND PRODUCTION

Index May-90=100

Note: Employment is for NAICS 211, 213111, and 213112. Production is shown as a 3mma.
Sources: Baker Hughes, EI/Haver Analytics
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American crude oil production grew, JOBS IN OIL AND GAS PRODUCTION DECLINED BY HALF

U.S. Field Production of Crude Oil (Thousands Barrels) vs. Upstream Oil & Gas Employment (2001/2013)

Source: EIA & BLS QCEW
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American natural gas production grew, JOBS IN OIL AND GAS PRODUCTION DECLINED BY HALF

U.S. Dry Natural Gas Production (MMcf) vs. Upstream Oil & Gas Employment (2001/2013)

Source: EIA & BLS QCEW
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