



EPRG-PRCI-APGA

23rd Joint Technical Meeting

Edinburgh, Scotland • 6–10 June 2022

YPP USA

Attracting and Retaining Young Pipeliners

Tyler Tunic – Williams / YPP USA

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Methodology

44

Total Gen Z
respondents

2

Research markets
(Houston & Boston)

4

Dial focus group
sessions

10

Hours of testing

59

Dial-tested
message clips

425+

Pages of written
exercise insights



Houston, TX | October 7, 2021



Boston, MA | October 12, 2021

Each respondent was either a current college student or a recent college graduate.

**What Do You Believe is the Industry's
Vision for America's Energy Future?**

What Should The Industry's Vision Be?

GEN Z'S IDEAL ENERGY VISION

TRANSITIONING
ENERGY INDEPENDENCE
RENEWABLES
THE MOST RELIABLE
COMBINATION OF SOURCES
LIMIT POLLUTION
SUSTAINABLE
HEALTHY
SHIFTING
RELIANCE
GREENER

GEN Z'S UNDERSTANDING OF THE INDUSTRY'S ENERGY VISION

REDUCING FOOTPRINT
MORE
PIPELINES
PROFIT
LOOKING AT OTHER SOURCES
NO IDEA
MAINTAINING GAS
DEMAND
REPLACING
COAL
LESS NATURAL GAS
FIXING AGING
INFRASTRUCTURE
MORE RENEWABLES

Section I:

Views of Natural Gas & the Natural Gas Industry





I. Gen Z's Top Energy-Related Concerns

Gen Z is an **extremely environmentally-conscious generation compared to their older counterparts**, who, unlike Gen Z, may prioritize affordability just as strongly as they would clean energy.

Most of Gen Z's primary energy concerns revolve around addressing **climate change and the impact of fossil fuels**, such as natural gas. Many are **further concerned about the health impacts of pollution** resulting from energy use and the burning of fossil fuels.



II. Views of Natural Gas / Comparison to Coal & Oil

While their views of fossil fuels are unquestionably negative, there is a distinction, for most, between natural gas and coal or oil.

Natural gas is not viewed as negatively as coal or oil, **but neither is it viewed as a fuel of the future**. The vast majority of Gen Z recognizes it as a fuel that will **help meet today's energy needs but is not at all future-focused**.



Key Point: That natural gas is not viewed as a fuel that is a future-focused fuel to power our clean energy future is an extremely damaging perception among career-oriented Gen Z'ers.

POSITIVES

AVAILABLE
EFFICIENT BETTER THAN COAL
SOURCE OF ENERGY
CHEAP ACCESSIBLE
INFRASTRUCTURE **JOB**
SUPPORTS
NEEDS
AFFORDABLE

NEGATIVES

EXPLOSIONS
CHEMICALS AND **SPILLS**
DISPLACEMENT OF INDIGENOUS
PEOPLE
CLIMATE CHANGE
EMISSIONS HEALTH ISSUES
TOXIC UNINTERESTING
POLLUTION
DETRIMENTAL

III. Peer Views of the Industry

What do Gen Z's peers think of the industry?

Many admit a **complete lack of awareness or thought given to it** – oil/natural gas are not frequent topics of social conversation (nor are companies mentioned in a positive light).

Most say they **have not seen or heard anything about what the industry may be doing to address their concerns**, which influences their perceptions.



IV. Positive Views of the Industry

Natural gas/infrastructure companies are generally viewed positively with respect to the ability to **provide affordable, reliable energy** and to provide an **essential service**.



V. Negative Views of the Industry

The industry is viewed most negatively as a **polluter of the environment**. Other wider environmental impacts (e.g., fracking) account for the majority of negative views.



VI. Views of America's Energy Future/Future Vision

The energy vision that Gen Z has for America is defined by **much greater use of clean and renewable energy**. It is a future that is more **innovative, affordable, and more sustainable**.



VII. What is the Industry's Vision? Gen Z is Not Sure... (But It's Not Positive)

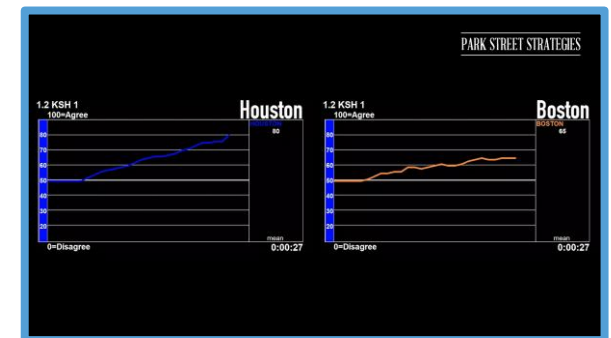
When asked if they could specify the natural gas/infrastructure industry's vision for the future, a majority were not sure. Those who answered surmised that it would **simply be the continued use of natural gas and oil** – which is not very exciting or enticing.



VIII. Can the Industry Play a Role in a Clean Energy Future?

The enduring question: Can the industry play a role in a clean energy future given **negative views about fossil fuels and natural gas** (i.e., not fuels of the future)?

For Gen Z, the answer is *somewhat*; **many questions linger** about a) **the sincerity/believability of this commitment** or b) the ability to do this **without a significant shift in business strategy**.





Section II:

Gen Z Career Aspirations & How the Natural Gas Industry Compares





I. Factors That Influence Career Path

Job stability, benefits and **compensation**, **upward mobility** or opportunities for growth, and **overall level of interest in the field** are key factors that Gen Z considers in determining where to work or start their career.



Key Point: The notable lack of interest in natural gas/infrastructure and in non-renewable energy will make it even more difficult for the industry to appeal to younger demographics.



II. Work-Life Balance vs. Compensation

The question of work-life balance versus compensation **is a false choice for some Gen Z'ers**. When asked how they would prioritize one over the other, some couldn't necessarily choose. Above all, it is clear that this is a generation that prioritizes their life and free time outside of work.



III. High Compensation Expectations

In both Houston and Boston, Gen Z'ers had **very high expectations in terms of salary for an entry-level job (i.e., >\$70k)**.

This could be viewed as a **positive if the industry can 'beat' this price** over others.



IV. Little Awareness of Industry Standards

It should be noted that there was very little awareness in either market of any type of industry norms or standards **with respect to the types of benefits and compensation offered**.



V. Lack of Awareness of Industry Jobs

Across all markets, Gen Z'ers **do not think about infrastructure or natural gas companies** when considering where they want to work.

For example, **very few had ever seen proactive efforts** to highlight the opportunities in this industry.



VI. Will These Jobs Exist in the Future?

The current lack of interest in the field – **beyond a lack of communication** or awareness – can also be attributed to the fact that the natural gas industry is **not currently seen as an industry that will continue to provide jobs well into the future.**



VII. How Does the Natural Gas Industry Compare?

To put it bluntly, the natural gas/infrastructure industry **ranks very low compared to other industries or companies** which are seen as more desirable or are perceived as offering more growth and opportunity. In other words, natural gas is no Apple or Google, which makes recruiting even more challenging.



Factors That Deter the Younger Generation From Working in the Natural Gas Industry



VIII. Factors that Deter Gen Z = Climate Values

Among the key factors that would actively **deter** Gen Z from pursuing a career in the natural gas/infrastructure industry are the industry's **harmful effects on the environment (pollution, fracking, etc.)** and **contributions to climate change.**

Others would even be deterred due to **social stigma of working in the industry.**



IX. Shared Values Matter

The ability of any future employer to **share and reflect many of the same key values** of their Gen Z employees is **critically important** to many in this demographic.

How Important Is It That Your Employer
Reflects/Shares Your Values?



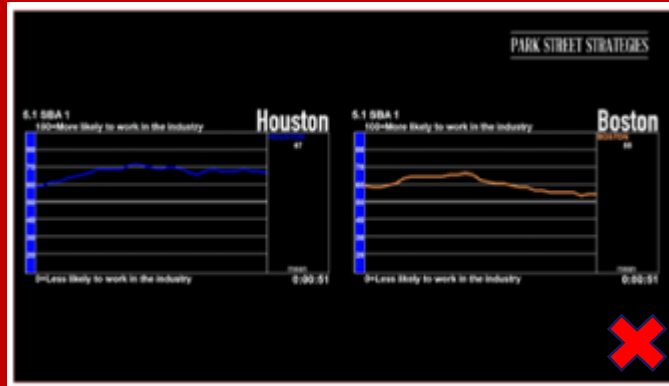
Key Point: While not important to all, Gen Z will increasingly look to their employers to **be more socially responsible than what would have been expected** a decade ago.

Section III:

Message & Communication Lessons

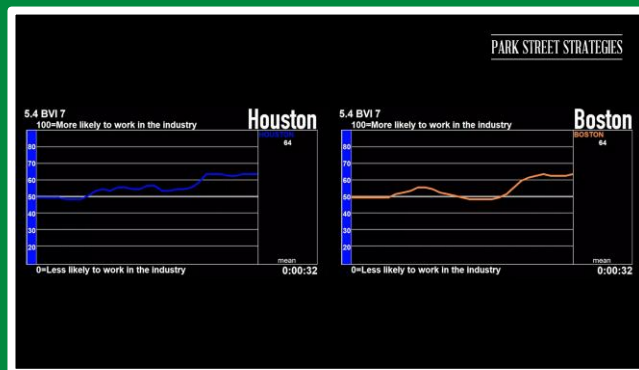


Ineffective “Big Picture” / Future Message



*We're also considering resourcefulness in **revisiting plugged-up or dried drill sites**. We're starting to revisit those sites that we thought and that were at the time dry; **sometimes we go back to them, and they're ready to be pumped again...***

Effective “Big Picture” / Future Message



*We're going through another transformation... pushing away from heavy production... **a lot more focus on being carbon neutral**, which you're seeing for everything, for all industries, all companies. It's interesting when you apply that concept to the energy industry, because we can directly impact the amount of carbon being polluted... building carbon capture facilities...*



I. An AGGRESSIVE Outreach Campaign is Required

The combined impacts of **negative perceptions** of the natural gas/the industry, a severe **lack of awareness of industry job opportunities**, and even concerns about social stigma of accepting an industry job, **all signify a need for a very aggressive outreach campaign** to effectively reach Gen Z and **make them more open toward working in this industry.**

Impact of Clean Innovations/Technologies
on Opinions of the Industry



II. Promote Your Clean Energy Technologies/Innovation

Hearing about **specific clean energy technologies and innovations**, such as carbon capture, renewable natural gas, hydrogen, etc. **makes many Gen Z'ers much more interested in industry jobs.**



III. Emphasizing Diversity & Inclusion

Gen Z must hear (and see) how the industry is embracing diversity and inclusion – **not simply as amorphous values, but as actual, living practices.** This is a message they **must hear loudly.**



IV. An Aspirational, Big-Picture Focus

Gen Z will **never take an interest in a career they perceive to be present-day focused**. You must tell a **different story**. This story must be aspirational, and it must be **part of something bigger** (i.e., a more positive, clean future vision).



V. Highlight Variety of Opportunities

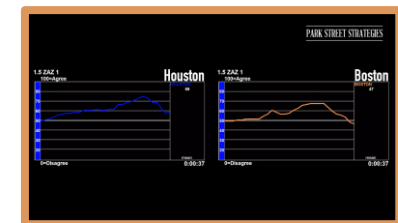
Because the initial perception among Gen Z is that industry jobs may be **somewhat limited to physical jobs in the field**, there must also be conscious efforts to make clear that a **variety of jobs are available in the industry**.



VI. It's Not All About Natural Gas (Natural Gas is Not the Future)

Gen Z **reacts negatively to broad assertions that natural gas is the “best” option** or that it is the ‘cleanest burning.’

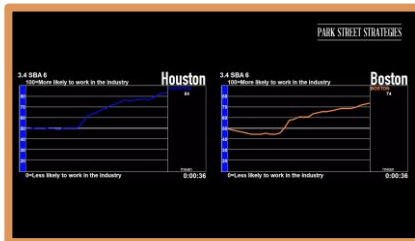
Communicating how the industry plans to be part of a clean energy future requires a different approach – **one that is not based primarily or exclusively on promoting natural gas. Failing to do this will makes it difficult for Gen Z to truly *believe* any industry climate/net zero commitments are real.**





VII. Make it About Growth & Benefits

To help dispel the **notion that natural gas/infrastructure companies are not a place to start or grow a career**, *especially for young people*, the industry must make explicitly clear how it is **positioned for (positive and clean/innovative) growth** - and thus can become a place for a young person to grow their career.



VIII. Who Are the Best Messengers?

Effectively communicating to Gen Z requires **more relatable messengers**. You must use **young, early career industry professionals** (who don't all simply work in the field).



IX. How/Where to Reach Out to Gen Z

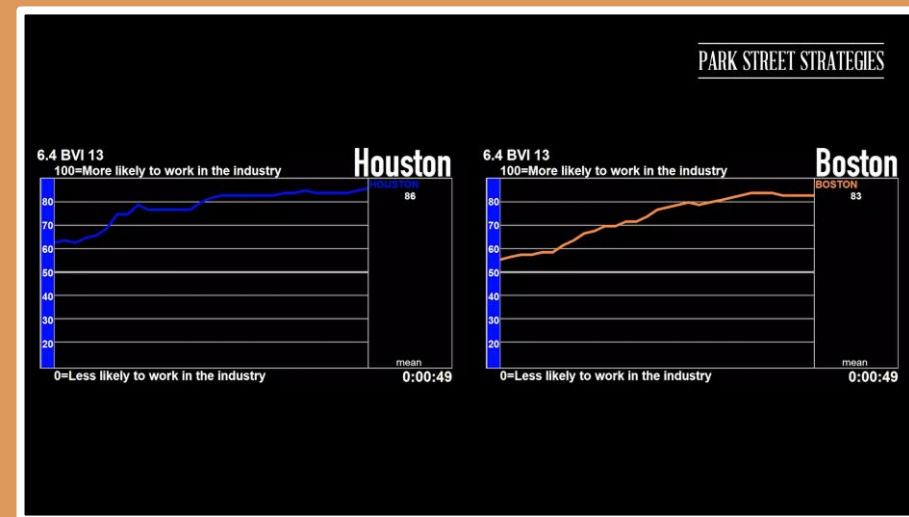
Career fairs are the best way to **meet Gen Z where they are**. Networking for jobs and internships (*especially in-person!*) makes this a great place to make more personal connections that can have a lasting, positive impact.

The Positive Vision to Emphasize

In Gen Z's Own Words...



Reaction to the Vision



Key Point: The vision must be future-focused and should highlight (specific) clean energy technologies and innovations, and ideally how the industry is working to address climate change.

Five Key Elements to a Gen Z Recruitment Message

1

Acknowledge
climate change



The biggest challenge of our time must
not be left out of the conversation

2

Being part of something
bigger



Gen Z wants to know how their work
can contribute to a better world

3

Use young
industry professionals



Gen Z wants to hear from people
just like them – young professionals

4

Clean tech &
innovation



Industry jobs are a lot less
'exciting' without

5

Benefits &
work-life balance!



Work is important, but Gen Z expects to
be paid well and enjoy their time off, too

The background is an abstract geometric pattern composed of numerous triangles in various shades of blue and teal. The colors range from very light, almost white, to deep navy blue. The triangles are of different sizes and are arranged in a way that creates a sense of depth and movement, with some areas appearing more prominent than others.

Thank you for your attention.