



The 2011 **Sustainability** Roles & Salary Survey. Executive Summary.

This unprecedented survey will provide insight into the individuals employed in this expanding market, from the types of organisations they work for, to their job functions, salaries and career backgrounds.



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Introduction.

The Sustainability Roles and Salary Survey is a collaborative project between recruitment consultancy Turning Green and key partners: The Association Of Chartered Certified Accountants (ACCA), Green Building Council of Australia (GBCA), Australian Green Infrastructure Council (AGIC), Environmental Jobs Network (EJN) and Models of Success and Sustainability (MOSS).

This Australian survey is aimed at professionals working in environmental, climate change and sustainability roles, to gain understanding into this rapidly evolving field.

As a vast area with a wide range of professionals, defining the sustainability space has been a challenge. For the purpose of this inaugural survey, we targeted those individuals who are registered members of the relevant industry groups and associations and/or in the Turning Green network. The survey was distributed online and via email to the professional networks of the five partners. Participants were also encouraged to distribute the survey to relevant professional contacts.

This survey is focused on sustainability roles in the corporate environment, however much of the work being done within corporations would not be possible without input from consultancies and not for profit ventures.

To narrow down the 24 targeted industry sectors we compared industries serviced by the sustainability and climate change practices of professional services companies, to those already scoped out by association groups in the sustainability field. We then cross-checked the generated list with the highest level ANZSIC classifications to ensure all 'official' sectors were covered. An in depth research process was undertaken to define unique roles across industry sectors to provide participants with role choices. Participants were also encouraged to add the details of any team members so that hierarchies could be documented and additional roles identified for use in future surveys.

The survey attracted 804 respondents with a 77% completion rate. This report provides an Executive Summary of findings. A detailed survey report will be available shortly with additional commentary from senior professionals across industry. For a copy of the complete report please contact Turning Green Managing Director, Lisa Tarry, via email lisa@turninggreen.com.au.

Foreword.

Foreword by Kate Harris, Sydney Director, Centre for Sustainability Leadership.

The Australian Government's climate change plan has four pillars: a carbon price; renewable energy; energy efficiency; and action on land. The movement to a clean energy future will provide new employment opportunities for Australian workers and ensures that Australia continues to experience strong jobs growth, while at the same time providing incentives to cut pollution in our economy.

Many businesses have been waiting for greater certainty about the competitive landscape before taking more ambitious steps. Greater certainty will lower business and financial risk, and accelerate a transition to a low carbon, resource-efficient, global green economy. This, in turn, will make it easier for the corporate sector to give the green light to key business decisions to improve energy efficiency or adopt new low-pollution technologies.

This unprecedented, Sustainability Roles and Salary Survey underlines that this transition is underway across a range of professions and industry sectors – one that will undoubtedly accelerate as the Government delivers on its commitment to:

- Support jobs and competitiveness as Australia moves to clean energy future
- Introduce a Jobs and Competitiveness Program that will provide \$9.2 billion over the period to 2014-15 to assist the most emissions-intensive activities in the economy that are exposed to international competition. This will support local jobs, encourage industry to invest in cleaner technologies and avoid 'carbon leakage' offshore
- Provide a \$1.2 billion Clean Technology Program that will help directly improve energy efficiency in manufacturing industries and support research and development in low-pollution technologies
- Increase the capacity of small businesses to invest in new assets, including those that improve energy efficiency, and to increase the instant asset write-off threshold to \$6,500.

KPMG's preview of its 2011 global corporate sustainability report shows sustainability has moved up the corporate agenda in the past three years and indeed, 41% of the respondent base of this survey hold senior roles with over 15 years experience with 38% saying they would be hiring more than one position in the next year proving a growth in green jobs.

The ACCA recognise that the inclusion of sustainability and environmental issues throughout the ACCA qualification is of vital importance for future generations of finance professionals. With 35% of respondents citing skills shortages as an issue in the next twelve months, it is critical that sustainability is a core focus.

The Australian Sustainability Salary Survey is a great start in underlining how the world of work is evolving in the direction of sustainable, green business.

Kate Harris
Sydney Director
Centre for Sustainability Leadership

Overview of Results.

1. The Sample.

804 professionals participated in the survey. 77% of the total respondents completed the survey and were accounted for in the survey results.

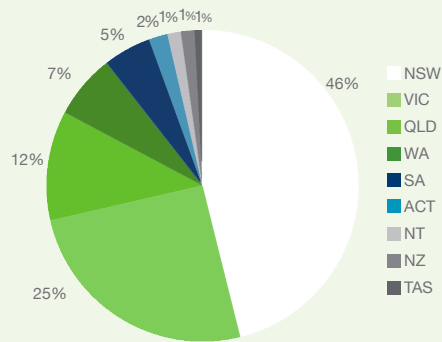
Of the 625 respondents who completed the survey 302 (48%) were female and 323 (52%) were male.

More than half of respondents hold in-house positions working on sustainability, climate change and environmental issues within their organisations, and more than 30% are from consultancies providing services to other organisations from advisory firms. 7% were from the not for profit sector.

2. Geography.

The survey gathered data from Australia's six states and two mainland territories with the highest response from NSW, followed by Victoria and the least from Tasmania. There was also 1% response from New Zealand. 4% of respondents are currently conducting their roles overseas.

Chart 2.1. Geographical Spread



3. Job Function. What do people do?

In Australia, there remains no agreed upon definition for 'green' occupations, which makes it very difficult to estimate what new and emerging occupations currently exist, or are likely to be created with various green economy plans.

What this report shows us is that sustainability and environment focused roles exist in all industry sectors (see Chart 3.1).

Whilst this survey focused on the corporate sectors, we saw participation from local government who have taken an active interest in the report.

There is certainly no simple solution to identifying where the skills gaps are, and we can see from the results that many positions deal with more than one function and involve a variety of skills.

Key issues driving business activities around sustainability in order of priority included:

- 1 Energy Management
- 2 Carbon Management
- 3 Water Management
- 4 Sustainable Procurement (Ethical Or Environmental)
- 5 Product Lifecycle
- 6 Product Composition
- 7 Ethical Labour Standards

Of the 233 different job titles provided, sustainability roles were grouped into the following top ten clusters as shown in Chart 3.2.

Chart 3.1. Spread Across Industry

Industry Sectors	0	20	40	60	80
Consulting (Professional Services)					80
Environmental Services					61
Consulting (Engineering Services)					52
Non-Profit					44
Energy and Utilities					45
Education					43
Property and Real Estate					40
Construction					38
Banking, Insurance, Financial Services					37
Manufacturing					24
Mining & Minerals					23
Not Disclosed					20
Media					15
Water					14
Food, Drink, and Consumer Products					13
Transportation Services					12
Aerospace and Aviation					9
Agribusiness					8
Telecommunications					9
Legal					7
IT					7
Hospitality					6
Healthcare					6
Computing Office & Software					6
Automotive and Assembly					6

Chart 3.2. Top 10 Role Clusters

Top 10 Role Clusters	0%	5%	10%	15%	20%	25%	30%	35%	40%	Avg Salary
Manager									37%	\$124,219.01
Consultant									16%	\$76,012.15
Director									10%	\$136,660.00
Advisor									7%	\$124,000.00
Officer									7%	\$68,663.14
Coordinator									7%	\$72,600.00
Project Officer									6%	\$60,868.42
Head of Sustainability/Environment									4%	\$184,458.33
General Manager									3%	\$207,125.00
Senior Consultant									3%	\$88,387.50

Table 4.1 Average Salary Of Top 10 Industry Sectors

Industry Sector	Average Salary
Property and Real Estate	\$144,253.84
Construction	\$134,482.53
Banking, Insurance, Financial Services	\$130,046.88
Energy and Utilities	\$118,484.23
Manufacturing	\$117,242.61
Consulting (Engineering Services)	\$98,152.69
Consulting (Professional Services)	\$98,152.69
Environmental Services	\$97,416.98
Education	\$90,230.64
Non-Profit	\$78,310.16

4. Remuneration & Bonuses.

For consistency all salaries and bonuses are reported in AUS\$.

Salaries

89% of the sample provided base salary information and the average salary across this sample was \$106,456.26 (the median salary was exactly \$90,000) and over half of the respondents earned above the median.

The highest average salary was in NSW (\$114,405.61), followed closely by Victoria (\$105,271.01). Respondents from New Zealand earned an average of NZD\$105,500.

Overall salary distribution

The highest average salaries in the top ten industry sectors were Property and Real Estate (\$144,253.84), followed closely by Banking, Insurance and Financial Services (\$130,046.88). The lowest average salary not surprisingly was in the Non Profit sector (\$78,310.16).

Average salary by industry sector

There were over 200 different job titles provided and there was not sufficient data available to make accurate averages of the salaries of professionals working in every job function, against every industry sector. However an average for each of the top 10 industry sectors is illustrated in the table 4.1. Please note that international salaries were not included in average salary calculations.

Bonuses

Exactly 50% of all respondents received a bonus and the overall average bonus was \$17,125 per annum, which is an encouraging sign.

Chart 6.1. Qualifications

Qualification	0%	5%	10%	15%	20%	25%	30%	Avg Salary
Bachelors (Other)						25%		\$113,024.89
Bachelors (Climate Change, Environment, Sustainability related)			18%					\$87,948.93
Masters (Climate Change, Environment, Sustainability related)			17%					\$97,831.15
Combination of >1 qualification			14%					\$110,251.22
Masters (Other)			13%					\$125,486.42
Professional Qualification (Related to current role)			10%					\$105,295.61
PHD			4%					\$119,847.83

5. Team Structure.

Average team size

Equal splits of 42% respondents were in either a stand-alone role or had one direct report. 27% had 3-5 team members and again, and equal split of 24% of respondents had between 5-8 and over 10 direct reports. Only 7% of respondents reported having a team of 10 or more.

6. Education, Qualification & Career History.

The objective of the COAG Green Skills Agreement is to develop national standards in skills for sustainability, within the requirements of the national regulatory framework in Australia. As a relatively new and evolving area, it has been useful to get an insight into the education and career backgrounds of the individuals working in the sustainability sector.

We found respondents to the survey were highly qualified, with 90% educated at tertiary level or above. Over 50% of respondents have related qualifications in climate change, environment or sustainability, 18% of those have achieved a bachelor degree, and the remainder has a master degree and/or additional related professional qualification (see Chart 6.1.).

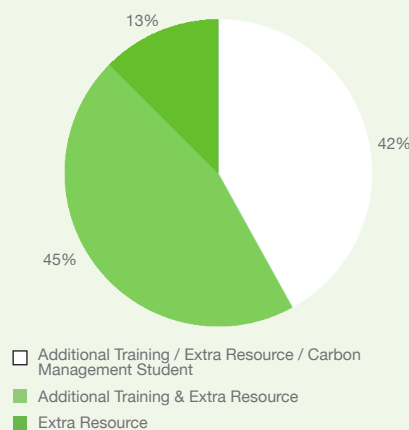
Based on the survey results, the length of time an individual has worked in the area directly impacts the salary level, with those with over 10 years experience commanding salaries of more than double those with two or fewer years experience. 41% of respondents had over 15+ years experience, and 15% of respondents were in roles that have been newly created in the last year.

Further analysis is being undertaken to understand the correlation between higher education and salary levels and will be included in the final report.

Key challenges for the future

35% flagged a skills shortage as the biggest factor that will make it difficult to recruit staff in the area of sustainability, climate change and/or environmental disciplines in the future. Respondents cited additional training for current employees, extra temporary/contract resources and/or matching students from the Cert IV in Carbon Management course to provide a carbon management response plan framework for their organisations as short-term solutions. (see Chart 6.2).

Chart 6.2. Skills Shortage - Short Term Solutions



7. Job satisfaction & Job Security.

67% of respondents to the survey reported being satisfied with their jobs, with the highest levels of job satisfaction in the not for profit sector (75%). This high level of satisfaction reflects that employees derive satisfaction from contributing to a cause, however willingness and commitment to do good may not be enough to keep employees satisfied. It is still essential to understand job attributes across sectors that determine employees' satisfaction particularly in relation to an individual's education and his or her job.

The match between education and job leads to equity with compensation, puts the knowledge and skills acquired by the workers to right use, and enables them to perform at a higher level, contributing to satisfaction within their chosen occupation.

In the nonprofit sector, flat organisational structure may allow management more flexibility to design or modify tasks in response to individual education and experience compared with other types of organisations.

The professional consulting (74%) and education sectors (74%) followed closely in terms of satisfaction.

The lowest satisfaction levels were reported in the property and real estate (58%) and construction (53%) sectors despite reporting the highest average salary in the top ten reported industry sectors.

This could indicate that individual's ideals are changing and that the financial return from a job is just one of the many components that attract them to a role. The subjective aspect of a position, for example work-life balance, contributing to a worthwhile cause and job satisfaction, is just as important as the objective outcomes of prestige, power, money, and advancement.

In conjunction with.



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