

# Saying Less But Doing More

Advancing Sustainability in Stormy Times

# Executive Summary

Since 2010, Trellis has assessed the state of the sustainability profession every two years, charting the attitudes and actions of business leaders engaged in addressing climate change. In 2022 and 2024, the vast majority of companies devoted more resources to sustainability, but this year, we wanted to see if that trend reversed in the face of the Trump administration's effort to dismantle U.S. climate policy.

It didn't.

Though the pace of investment has slowed and priorities have shifted, most large businesses are staying the course. Our survey of more than 500 sustainability professionals at firms with at least \$1 billion in revenue had three major findings:

## 1. Most companies continue to invest in sustainability, but a significant minority are now pulling back.

- **Resources:** 46 percent have increased sustainability headcount and budgets over the last two years. 25 percent have cut them. The rest are keeping sustainability roughly unchanged.
- **Public commitments:** Of companies that have announced sustainability targets, 57 percent say they have maintained them, 24 percent have strengthened them, and 16 percent have weakened or abandoned them.

## 2. Business sustainability initiatives are less public than in the past, with increasing focus on regulatory compliance and risk management.

- **Communications:** 63 percent of companies have scaled back their communications about sustainability or rethought how they talk about it.
- **Priorities:** 58 percent of companies are putting a higher priority on sustainability compliance, while 53 percent say social issues are less important.

## 3. Sustainability professionals are under growing stress, often finding their jobs more difficult and less fulfilling.

- **Job satisfaction:** 44 percent say their jobs are less fulfilling than they were two years ago; 33 percent say their roles are more fulfilling.
- **Career plans:** Only 47 percent of professionals think corporate sustainability offers the most attractive career path in the next five to 10 years.

While the professionals we surveyed often said they find the field discouraging and confusing, many also said they remain determined to keep working, pushing forward their objectives, expecting the pendulum of public opinion to swing again. Perhaps the most telling indicator of the state of the sustainability profession in 2026 was that twice as many respondents said they were optimistic as pessimistic.

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# Preface

## The evolution of the sustainability profession

By John Davies

President, Networks | Trellis Group

I have never been more excited about the future of sustainability than I am today.

As we publish the ninth biennial *Trellis State of the Sustainability Profession* report, we find ourselves in a much-changed world. We are operating in a highly volatile and uncertain political and economic landscape. Regulatory requirements are in flux, and inevitably the sustainability job is too. As sustainability moves to the mainstream from the margins, the rules also change.

And yet these are good things – for you and for the field. I’ve been working closely with sustainability leaders for more than two decades, most of it running the Trellis (and before that GreenBiz) professional networks. I’ve seen how your efforts are being pressure-tested by how you are contributing to the growth and prosperity of your company. You are being evaluated now like those in every other part of the organization. That will make sustainability stronger.

Irritation can turn sand into pearls, and pressure can turn coal into diamonds. During a meeting in February of Trellis Network chief sustainability officers, we discussed what’s needed for the next generation of sustainability leaders. They said many on sustainability teams bring extensive subject matter expertise but lack a deep understanding of their company’s business. Dave Stangis, a pioneer in the field who was most recently the chief sustainability officer of Apollo Global

Management, has told his teams they need to read annual reports and 10-Qs to find the irritations and opportunities in the business. Do it – you and the outcomes will be better for it.

Sustainability, and I'll contend the role of the CSO, is not going away. It may shrink and expand to fit the times. It may get "anded" with other titles such as "innovation" or "risk management." In a rapidly changing world, CSOs are uniquely positioned to understand longer-term risks and opportunities and translate them into the language of the business.

Nineteen years ago, I first wrote about the emergence of the "chief green officer" as organizations started to recognize that business risk and profitable opportunity required a new kind of executive with influence to pursue a "green" agenda.

Great progress has been made in that time, even if not enough. What hasn't changed is the direction we've been headed – reducing our environmental footprint and engaging across and beyond our value chains, all while remaining financially sustainable.

Back then, the sustainability leader may have come from any function, and for many, the key to success was having built strong relationships across the organization. The challenges they chose to address were defined in the context of their industry and company culture. Leaders could define what they measured and what they reported. It was a golden era of aspirational goal setting and pilot projects. Now we're working on proof points and ROI.

Still, our report this year identifies a significant decline in support from CEOs for sustainability programs. That shouldn't necessarily surprise anyone as tariffs, supply chain disruptions, DEI attacks and letters from attorneys general take up a lot of headspace. All of this can make the day-to-day work of sustainability disheartening.

At the same time, even amidst these headwinds, a powerful 32 percent of respondents to our survey reported *only* "positive" sentiment about the profession, using words like "optimistic" and "resolved." (The others had, in roughly equal amounts, either "mixed" or only "negative" feelings.)

It is exciting to see a whole new generation of sustainability leaders emerging who will build on what's come before and will be hardened by the current challenging environment.

Shine on you crazy diamonds.

# Introduction

**In 2024, when Trellis last** looked at the state of sustainability, the profession was confronting the growing pains of its success. No longer were its leaders just advocating for change and formulating long-term goals; they had to execute their plans while devoting more time to documenting their progress for investors and regulators. “Greenhushing” was on the rise as companies worried that boasting about aggressive targets could create legal liabilities if those targets were not met.

This year, the sustainability profession couldn’t be more different. Its problems do not stem from being taken too seriously but from being pushed aside and sometimes even treated as a pariah.

The Trump administration is dismantling policies meant to lower greenhouse gas emissions. Capital is flowing out of environmental, social and governance (ESG) investment funds. And a rapid cascade of political, economic and technological disruptions is diverting the attention of business leaders from longer-term issues, not least those related to the existential risks posed by climate change.

All these forces are evident in our survey of sustainability professionals, the latest in a biennial series that has chronicled how companies with \$1 billion or more in revenue have responded to climate change since 2010. Life on the front lines has changed radically from the first years of the decade, when professionals were buoyed by leadership support, organizational prominence, rapidly growing resources and rising compensation.

“It’s been a tough year for the profession,” said the chief sustainability officer of a healthcare firm, in a comment typical of many we received. “Sustainability has become much less of a priority, driven by less investor interest and more by our desire to stay on good terms with the president and federal regulators. Projects face tough scrutiny for return on investment when we have other priorities like investing in AI and paying tariffs.”

## The choice: stay the course or turn back

Yet, while the political environment has changed how the vast majority of companies talk about sustainability, most of them are quietly continuing to invest in reducing the climate impact of their products and operations, albeit with more resources diverted to documenting and reporting on these efforts.

When we looked at patterns in the answers to the more than three dozen questions in our survey, we saw that companies could be divided into three clusters:

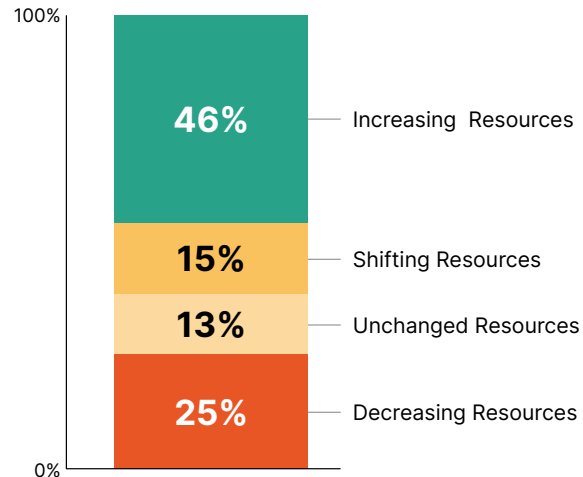
- **In drive:** A little less than half (46 percent) are continuing to devote more people and money to meeting their climate and other sustainability commitments.
- **In neutral:** More than a quarter are either keeping their investments unchanged (13 percent) or shifting how they allocate sustainability resources, i.e., increasing some areas while cutting others (15 percent).
- **In reverse:** Exactly one quarter has backtracked on their sustainability efforts, cutting staff, slashing spending and in some cases rescinding past commitments.

“We’re entering a period of recalibration, after drifting toward initiatives that lacked strong business cases. This moment is the opportunity to ensure our programs are grounded in both impact and commercial relevance.”

Head of sustainability, Australian travel company

## More companies are increasing investment in sustainability than cutting back

Change in sustainability headcount and staffing budgets over the last two years



**Results are from a combination of four questions** about budget and headcount changes for the core sustainability team, and about sustainability across the entire organization, compared to two years ago. “Shifting Resources” means there were increases in some sustainability categories and decreases in others.

At some companies, the motive to pause or pare back comes directly from concern about losing government contracts or prompting unwanted regulatory attention. At others, funds for sincerely made climate initiatives are being delayed because their business hit hard times or diverted to more pressing investments. And there are some where management has seized on the shift in political sentiment to scale back initiatives they never fully supported.

For companies that continue to invest in sustainability, the approach, not surprisingly, is more sober than in years past, when net-zero pledges and bold decarbonization plans could earn press and plaudits. Today, sustainability professionals prioritize projects that can cut costs, bring in new revenue or mitigate risk. They are also focused on complying with climate disclosure rules in the European Union and some U.S. states, especially California. When companies do make progress — slashing emissions or reducing waste — they are much less likely to boast about it.

“Luckily, for now our company is doing well, and there is still cautious support at the top for sustainability,” wrote the chief sustainability officer of a U.S. retail company. “But we need to keep our heads down, be quiet about our progress and align environmental benefits with business drivers.”

One way to assess how companies view sustainability is by how much they pay

the professionals who design and implement their environmental goals. Our annual assessment of compensation in the field echoes the slowdown we see in the rest of the survey: Over the past two years, salaries and total pay grew at the slowest rate of the decade. Compensation for senior sustainability executives actually fell slightly.

## **The emotions: anger and optimism**

This year, we broadened the scope of our survey to take stock of the changing landscape. We added questions to help us determine whether and how company priorities have changed. And we looked at the impact of evolving public and government attitudes toward sustainability on the professionals who have devoted their careers to the field.

It would be an understatement to say that many in the field have been hit hard by the shifting attitudes. The most common response to questions about their feelings about the profession was “discouraged.” Nearly as frequent, though, was “resolved.” Indeed, many of the professionals admitted to a mix of positive and negative feelings, “insecure” yet “accepting,” for example, or “angry” but “optimistic.”

Respondents identified many strategies that they and their teams use to achieve their goals in these difficult times. Doing more with less was one common theme. So was being ruthless about prioritization, typically on projects that would save money or otherwise deliver measurable business value.

For some, the stress from unreliable management support and growing regulatory burdens has raised questions about whether to continue working in the profession. Only half are sure that they want to be working in a corporate sustainability job five or 10 years from now.

And yet, many said they remain energized by the challenges and expect the profession to emerge stronger from the current turmoil. “This is an inflection point when we move from the aspirational to the operational,” said the head of sustainability for a division of a large global food company. “We’re talking less, but we’re doing more.”

A word about interpreting the results of this report: The *Trellis State of the Sustainability Profession* survey is the oldest and most established study of its kind, attracting well over 1,000 respondents, more than 500 of whom are in qualified positions at companies with revenue over \$1 billion. Most of the participants were recruited from the readers and clients of the Trellis Group, the leading media and events company for sustainability professionals. As such, companies that employ few sustainability professionals are likely to be under-represented.

# The critical role of the CEO

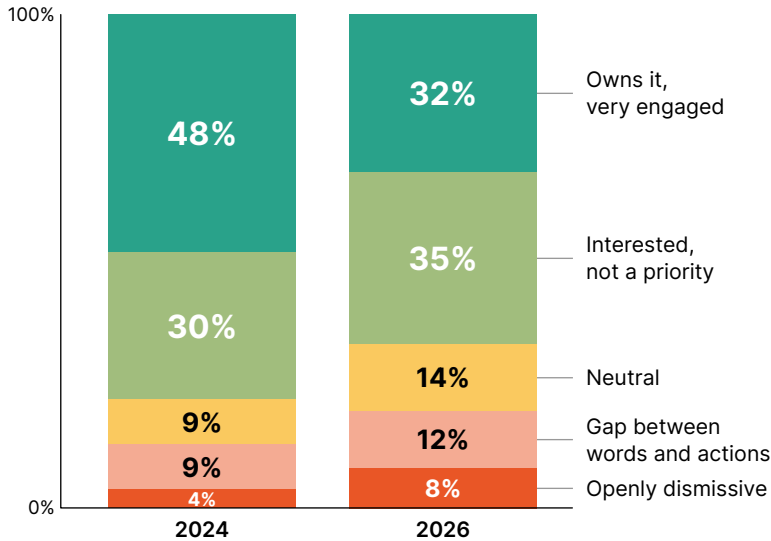
As we dug into the data we collected, we found that one factor was linked to many of the areas we explored: the attitude of the chief executive.

For a decade, we have asked professionals, “How involved is your CEO in your organization’s sustainability program?” They answered on a seven-point scale, from “openly dismissive” to “owns it, very engaged.”

CEOs were progressively more involved through 2022, before engagement declined slightly in 2024. This year, it fell to the lowest level we’ve seen. To be clear, 67 percent of professionals still see their company leaders as at least modestly positive toward sustainability. But that’s down from a peak of 86 percent four years ago. And now 20 percent are seen as having a negative view of sustainability, matching the previous low from 2016, the first time we asked this question.

## CEOs are less engaged with sustainability

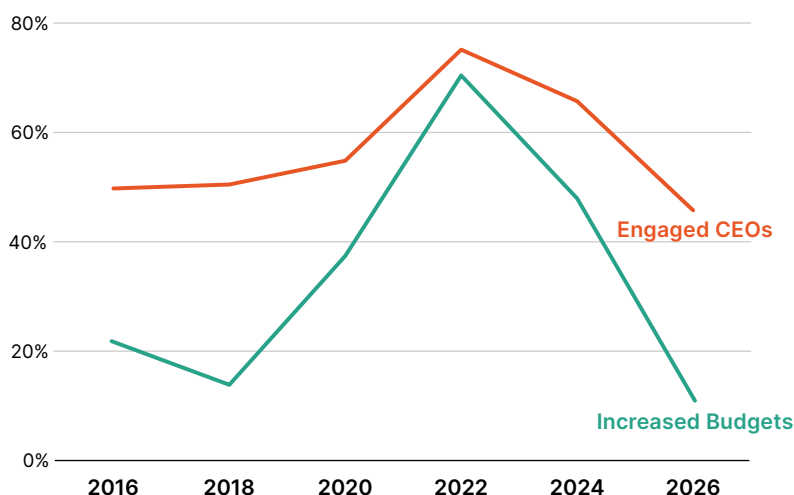
Q: How involved is your CEO in your organization’s sustainability program?



When we looked back at our surveys from the last decade, we saw that this relationship has been consistent through the ups and downs of the profession. For example, we compared a measure of net sustainability spending — the number of companies increasing their budgets minus the number decreasing theirs. This measure closely tracks a measure of net CEO attitudes — those with a positive view of sustainability minus those with a negative view.

## Company sustainability spending tracks CEO engagement

The net number of companies with CEOs engaged with sustainability compared with the net number increasing their sustainability budgets



**CEO Engagement:** a net score calculated by subtracting the percent of CEOs with a negative attitude toward sustainability from those with a positive attitude. **Budget Increase:** a net score calculated by subtracting the percent of companies cutting sustainability budgets from those increasing them.

The influence that a CEO's attitude has on their company's sustainability strategy was particularly noticeable to respondents who worked at companies that replaced their CEOs.

"We've had three CEOs since 2022, each with a different approach to sustainability," explained the CSO of a U.S. manufacturing company. "The first was ambitious and saw sustainability as a way to build his reputation. The second was pragmatic and focused on the impact. The latest is dismissive of any strategies that lack a clear financial return."

Several respondents described how changes in senior leadership prompted major cutbacks to their sustainability programs.

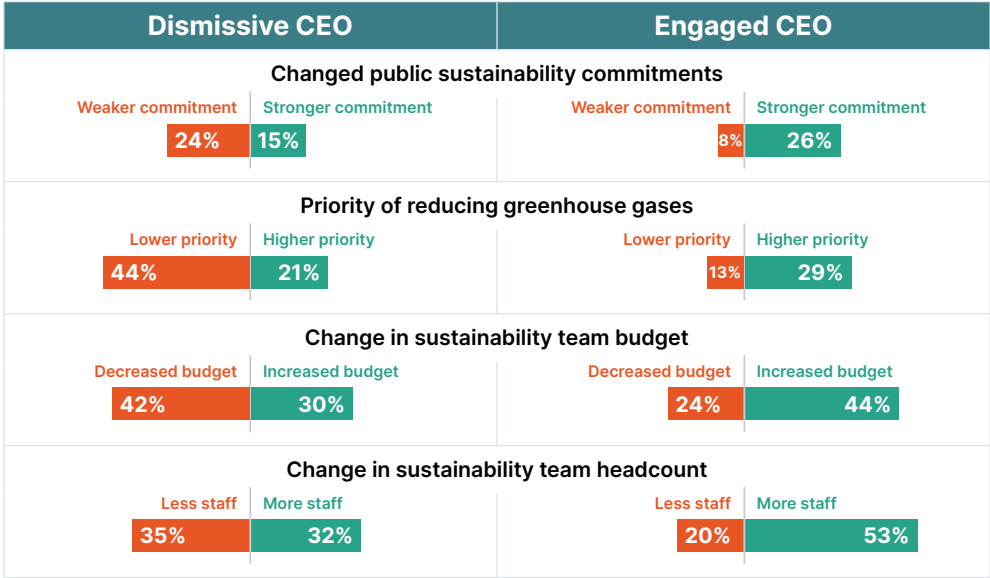
"After the departure of our previous CEO, who was very committed to sustainability, it set off a major crisis in our company," said a former director at a German technology company, who was laid off in the reorganization launched by the new chief executive. "There is no more corporate sustainability function. The focus is only on short-term cost control and efficiency."

**"The politicization of sustainability has made leaders much more risk-averse."**

Climate manager, U.S. retail company

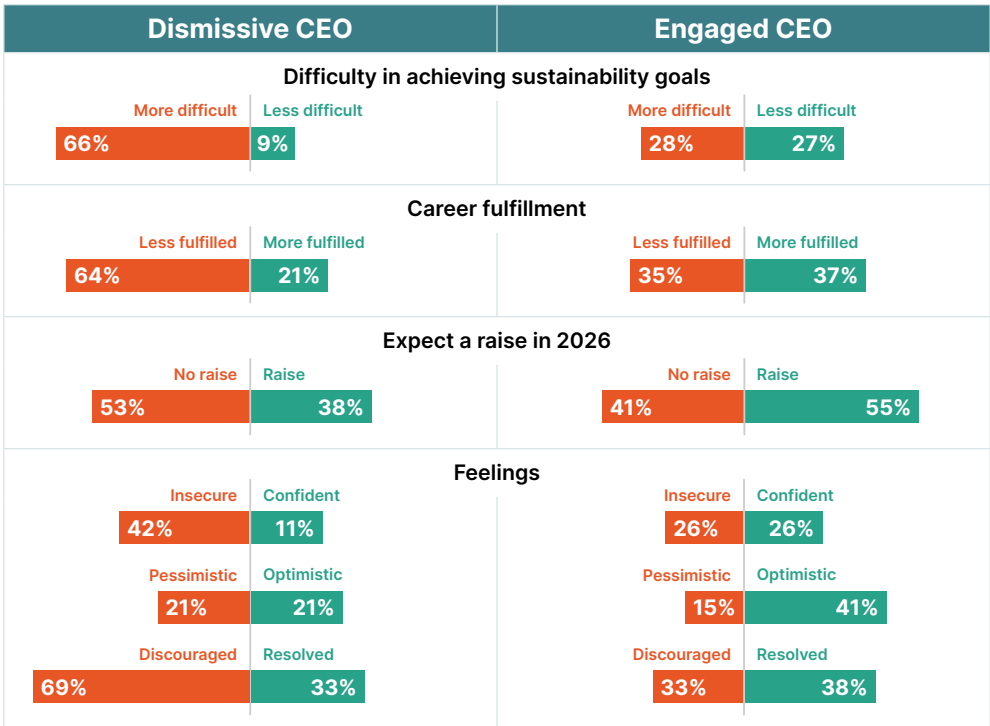
# Chief executives have a big impact on how their companies prioritize and approach sustainability ...

How sustainability commitments, priorities and spending differ between companies whose CEOs are engaged with sustainability and those whose CEOs are dismissive of it



# ... and how sustainability professionals feel about their jobs

How the attitudes and feelings of sustainability professionals differ between those working at companies whose CEOs are engaged with sustainability and those whose CEOs are dismissive of it



**Dismissive CEO:** respondents who answered 1, 2 or 3 to the question, "On a scale from 1 to 7, how involved is your CEO in your organization's sustainability program? **Engaged CEO:** respondents who answered 5, 6 or 7 to the same question.

# Pressure on the largest companies

Company size was a significant factor in many of the areas we looked at. Midsize companies were more likely to continue recent trends, expanding their sustainability commitments and increasing their investment to fulfill them. Larger companies were more divided between those building out sustainability activities and those cutting them back.

Our survey defined large companies as those with revenue of at least \$10 billion. In the U.S., this group is roughly the largest 500 companies. Midsize companies are those with sales between \$1 billion and \$10 billion, representing about 5,000 U.S. firms.

The midsize group was much more definitive in committing additional staff and money to sustainability, with 51 percent increasing resources and 20 percent decreasing them. At the largest companies, the distribution was more evenly split, with 41 percent devoting more resources to sustainability and 31 percent devoting less. The large companies were particularly cautious in their spending choices, with one-third increasing spending in the sustainability department and the same number cutting it. They were more likely, however, to increase headcount, with 46 percent increasing staff in the sustainability department and 28 percent eliminating positions.

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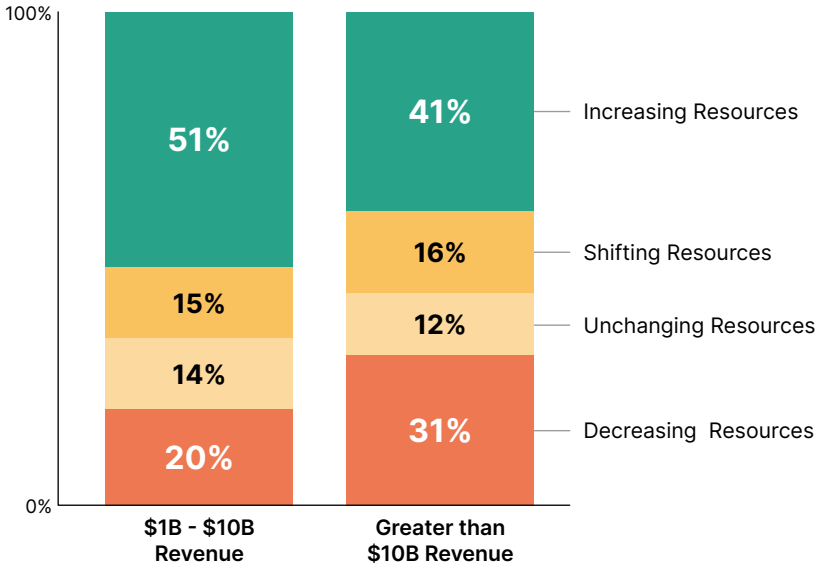
**“While we never framed our program as ‘doing the right thing,’ given the current political environment, we are leaning in extra hard to the cost savings we are driving and revenue we are bringing in.”**

**Chief sustainability officer**, U.S. consumer packaged goods company

Big companies, moreover, were less likely to strengthen their public climate commitments and more likely to modify or scale back their communication about sustainability. The survey didn't reveal a clear explanation for why larger companies are becoming more skittish. Still, the forces that respondents discussed most often — profit pressure and concern about offending the Trump administration — are likely to be stronger at publicly traded companies with prominent brands.

# Larger corporations are more likely to cut sustainability budgets and headcount

The change in resources devoted to sustainability over the last two years



**Change in resources devoted to sustainability:** calculated from a combination of four questions about budget and headcount changes for the core sustainability team, and for sustainability across the entire organization, compared to two years ago. “Shifting” resources means there were increases in some categories and decreases in others.

Changes at larger companies are negatively affecting the sustainability professionals who work for them. Even though they earn 24 percent more than those at midsize firms, professionals at big companies are much less satisfied with their jobs: 49 percent say their careers are less fulfilling than they were two years ago, compared with 38 percent at midsize companies. Similarly, 44 percent of people working in sustainability at big companies say their jobs have become more difficult, while only 33 percent at midsize companies do.



# Strategy

**We asked several questions to** understand what is driving corporate sustainability strategy. Two themes stood out.

First, many companies are looking to rationalize initiatives they started in recent years, many of which were accompanied by bold public targets. Some are finding that they promised more than they can afford to deliver.

“We’re entering a period of recalibration, after drifting toward initiatives that lacked strong business cases or didn’t align with our core priorities,” wrote the head of sustainability at an Australian travel company. “This moment is the opportunity to ensure our programs are grounded in both impact and commercial relevance.”

Second, most companies are under pressure to comply with upcoming regulations mandating disclosure of greenhouse gas emissions and other metrics. But keeping up with the changing rules is a time-consuming task in itself. The Trump administration is not pursuing the disclosure program that the Securities and Exchange Commission began under President Biden. And the EU has postponed its mandate for some companies. On the other hand, California now requires large companies doing business in the state to begin to disclose greenhouse gas emissions by mid-2026.

Some companies look at this tangled state of affairs and just see work to be done. Others feel whipsawed by the changing landscape.

“The regulation and compliance departments are losing credibility with management for crying wolf about rules that were never implemented,” observed a sustainability director at a Swiss food company. “Meanwhile, impact-driven employees are disillusioned and exhausted by their jobs being driven by regulations.”

## **An absence of demand**

Just as notable is what sustainability executives are not saying. In their comments, few of the professionals who responded to the survey said their companies are trying to be seen as leaders in the fight against climate change.

“We were allowed to set targets for 2030, but they were less ambitious than in the past, and we couldn’t announce them publicly,” wrote the head of sustainability at a U.S. hospitality company.

Respondents are not seeing much pressure from the public or investors to accelerate their sustainability efforts. What they are seeing is the hostility of Washington, D.C., toward any acknowledgment of climate change.

“The politicization of sustainability has made leaders much more risk-averse,” observed a climate manager at a U.S. retail company.

Many companies that serve other businesses say there is demand for more sustainable products, especially those that can cut energy costs. But some that had been trying to create more environmentally friendly products for consumers are dropping the effort.

“We are told consumers don’t want sustainable products from us,” noted a director at a U.S. maker of mass-market consumer products. “So brand teams are not willing to stress their margins to use more sustainable materials.”

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**“There is still cautious support at the top for sustainability, but we need to keep our heads down, be quiet about our progress and align environmental benefits with business drivers.”**

**Chief sustainability officer, U.S. retail company**

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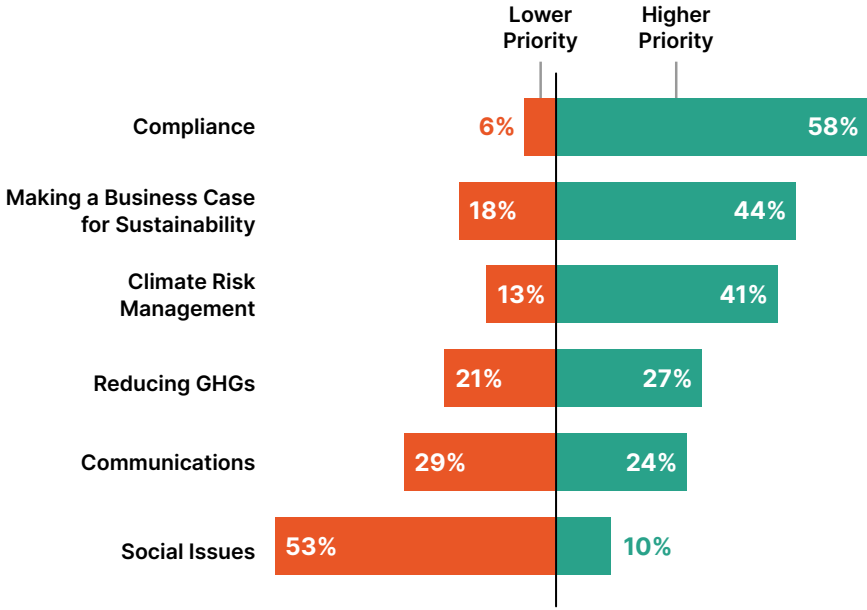
# Priorities: shifting to regulation

Practical issues related to sustainability have become increasingly important to most companies over the past two years as they focus less on the environmental or social impact of their actions. We asked how companies changed the prioritization of several issues and found:

- Much higher focus on compliance, making the business case for sustainability and risk management.
- Sharply lower emphasis on social issues, which respondents described as mainly diversity, equity and inclusion (DEI).
- The importance of addressing climate change by reducing greenhouse gas emissions stayed roughly the same.

## Business leaders are prioritizing sustainability compliance more

Q: Do your company's leaders put a higher or lower priority on these actions compared to two years ago?



Omitted: responses of "About the same."

# Communication: talk less, smile more

In the first part of the decade, companies in all industries were eager to tout their sustainability initiatives. They could appeal to ESG-focused investors and align themselves with the Biden administration's climate agenda. If there were any doubts, they stemmed from the potential legal risk of promising more than they could deliver.

Given the changes from Washington and Wall Street, though, it's no surprise that our latest survey found that, for many companies today, the less said about sustainability, the better:

- 63 percent have scaled back sustainability communications or changed how they talk about it.
- Companies with more than \$10 billion in sales are particularly reticent, with 80 percent downplaying or changing public statements.
- Several companies mentioned that they had removed previously published sustainability reports from their websites.

Businesses and other organizations that have contracts with the federal government are watching their words especially carefully to avoid offending the Trump administration's sensibilities.

"The government is having a chilling effect on all our communication," wrote the head of sustainability at a large northeastern university. "If we use certain words, they will cut off all our research funding."

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**“The government is having a chilling effect on all our communication. If we use certain words, they will cut off all our research funding.”**

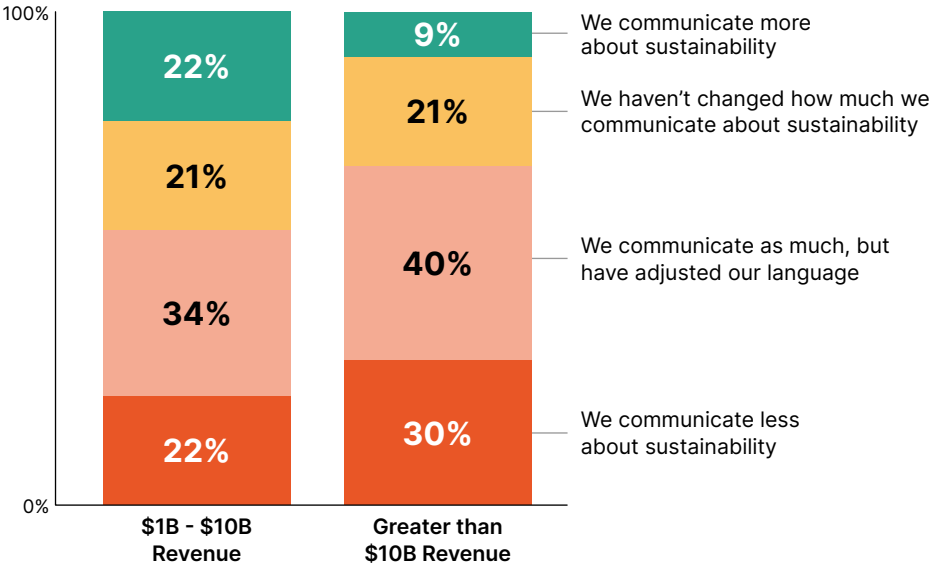
**Head of sustainability**, Large northeastern university

When we probed deeper about communications strategies, dozens of professionals talked about changing the language they use — or, as one consultant put it, “code-switching when specific words or acronyms become politically sensitive.” Some examples:

- “All DEI language has been stricken from our website.”
- “We talk about ‘energy savings’ instead of ‘carbon reduction,’ ‘asset protection’ rather than ‘resilience’ and ‘inclusion and engagement’ instead of ‘inclusion and diversity.’”
- “Rebranding from ‘sustainability’ to ‘resilience and prosperity.’”
- “We describe in greater detail our focus on preparing a diverse and robust climate workforce, rather than relying on acronyms like ‘DEI.’”
- “As of last year, ‘diversity’ and ‘climate change’ were completely taken out of the sustainability report.”

**Most companies are changing or cutting back sustainability communications**

Q: How has your company changed how it communicates to the public and investors about sustainability and climate issues over the last two years?



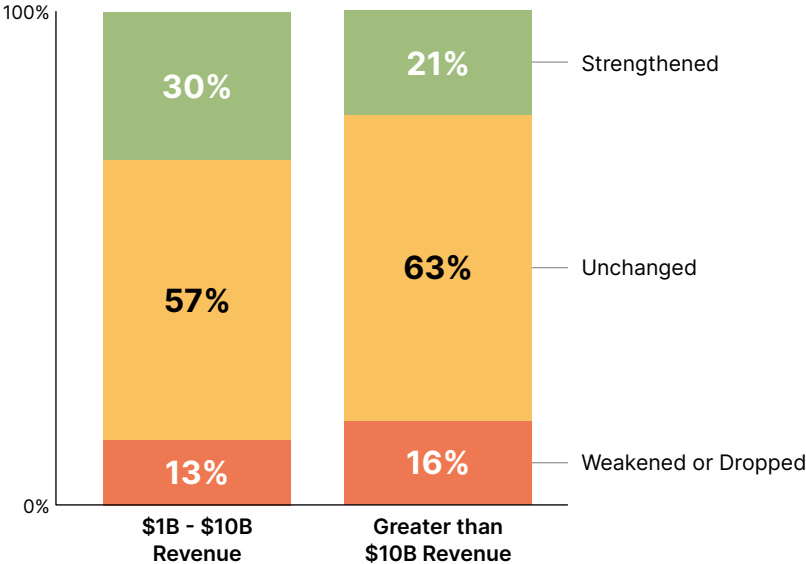
# Public commitments: holding steady

Nearly all (95 percent) of the companies in this year’s survey said that they had some public commitment to sustainability or climate issues as of two years ago. Since then, 57 percent have kept those commitments the same, 24 percent have strengthened them and 14 percent have weakened their promises. Only 2 percent dropped their public commitments entirely.

Larger companies were more likely to weaken their commitments and less likely to strengthen them. Companies in the technology industry and those outside North America were more likely to promise greater climate action, while those in finance were more likely to scale back.

## Midsized companies are strengthening their climate commitments more than larger ones

Q: How have your company’s public climate or sustainability commitments changed over the last two years?



Percentages of companies that had sustainability commitments in 2024.



# Organization

**Over the 16 years of** this study, we've seen companies house sustainability teams within nearly every major business function. After all, by the nature of the problems it addresses, the sustainability field touches every aspect of a business, from sourcing supplies to delivering final products, not to mention all the legal, financial and communications functions. So it's not inherently obvious where sustainability should fit on a company's org chart.

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**“Changing organizations from within is a strange, brutal and often unrewarding game.”**

**Sustainability lead, U.S. energy company**

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In recent years, a growing number of CSOs of many companies reported directly to the CEO, giving the function prominence and organizational clout.

Now, that trend is reversing, and many sustainability groups are being shifted into legal, finance or other departments. Often, our survey respondents tell us, the shift reflects the lower priority that leaders place on the effort.

To be sure, some companies with deep commitments to sustainability are shifting people out of central teams to embed expertise on the front lines of their organizations. And our survey results reflect that as well.

# Reporting lines: CEO out, legal and finance in

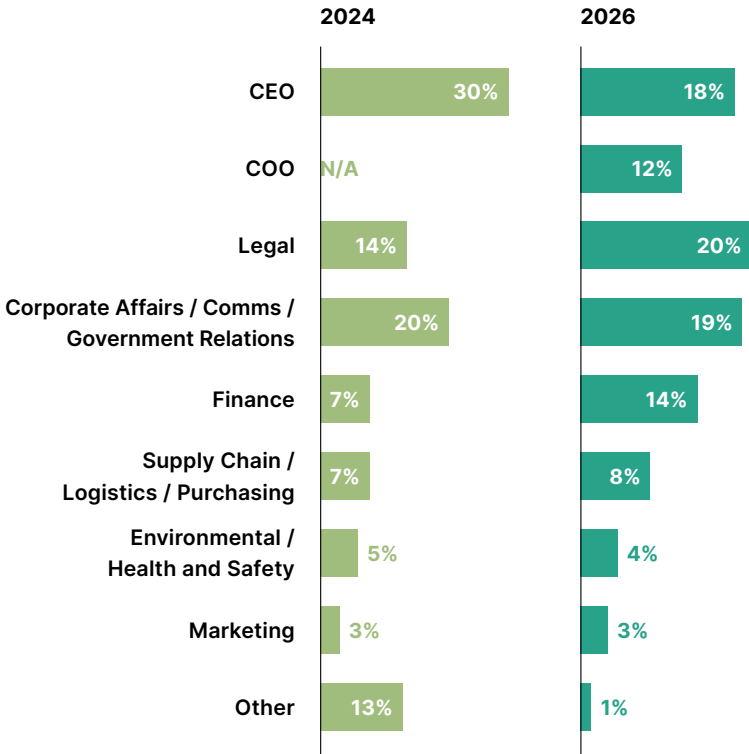
Where a sustainability team fits into its organization is highly significant for many professionals. The more direct access to senior executives, they believe, the more strategic their work will be. When they report to legal or marketing, for example, priorities may be defined more narrowly.

Our survey found that fewer sustainability teams report to the CEO, down from 30 percent in 2024 to 18 percent today. Notably, the number reporting to finance doubled, to 14 percent from seven percent two years ago, perhaps reflecting the increasing emphasis on sustainability reporting.

At larger companies, it was most common for corporate affairs to oversee the sustainability group. At companies with less than \$10 billion in revenue, the group was most often located in the legal department.

## Fewer sustainability teams report to the CEO

Q: Which business function does the sustainability team primarily report to?



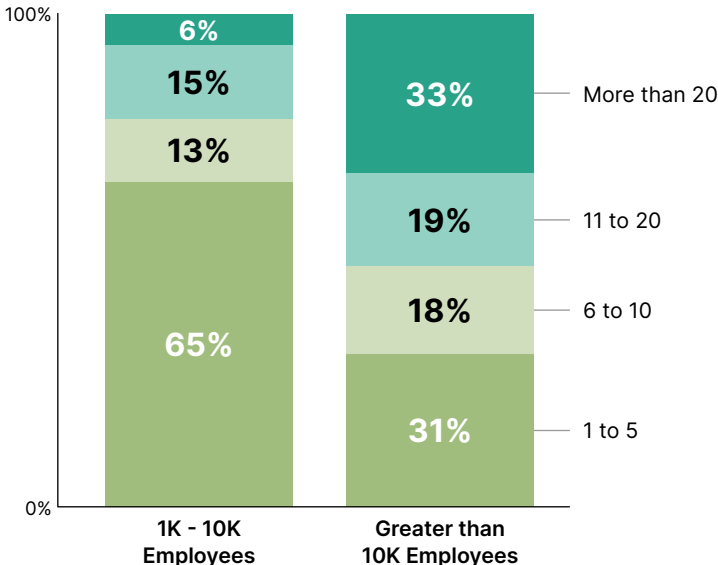
N/A: COO was not an option in 2024.

# Organization: moving the action away from the center

To understand more about how companies organize their sustainability efforts, this year we divided our questions about staffing and budgets into two parts, examining separately the “core team or department focused on sustainability and climate issues” and the “sustainability activities embedded in your company’s organization, except for the sustainability team.” The size of teams, of course, relates to the company’s overall size. For businesses with between 1,000 and 10,000 employees, the core sustainability team most commonly has five or fewer people. Among companies with more than 10,000 workers, 52 percent have 11 or more people on their core teams.

## Most sustainability teams have fewer than 10 people

Q: How many people work in your company’s sustainability team?



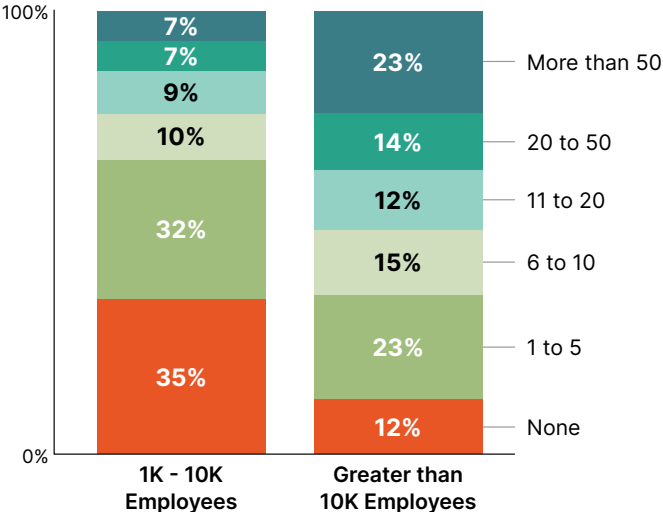
In 2026, 80 percent of all the companies in the survey have people working full-time on sustainability elsewhere in the organization, down from 86 percent in 2024. Embedded workers are much more common in the biggest organizations.

At companies with between 1,000 and 10,000 employees, 65 percent had embedded workers, most commonly between one and 10 people spread through the organization. At larger companies, 88 percent had sustainability workers outside the core team. Half (49 percent) of companies with more than 10,000

employees had at least 11 people embedded in the organization working on sustainability, and a quarter (23 percent) had more than 50.

**One-third of midsize companies have no sustainability staff outside of their core teams**

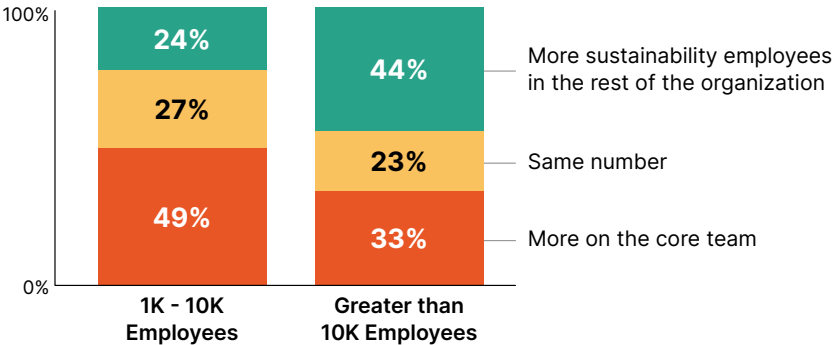
Q: Outside of the core sustainability team, approximately how many other people in the organization work primarily on sustainability?



Putting these last two questions together allows us to see how companies are addressing the perennial question: How best to balance resources between a central team and expertise spread throughout the company. Larger companies are more likely to have more embedded people, while smaller ones typically have more in a core group.

**Larger companies distribute sustainability staffers while smaller ones centralize them**

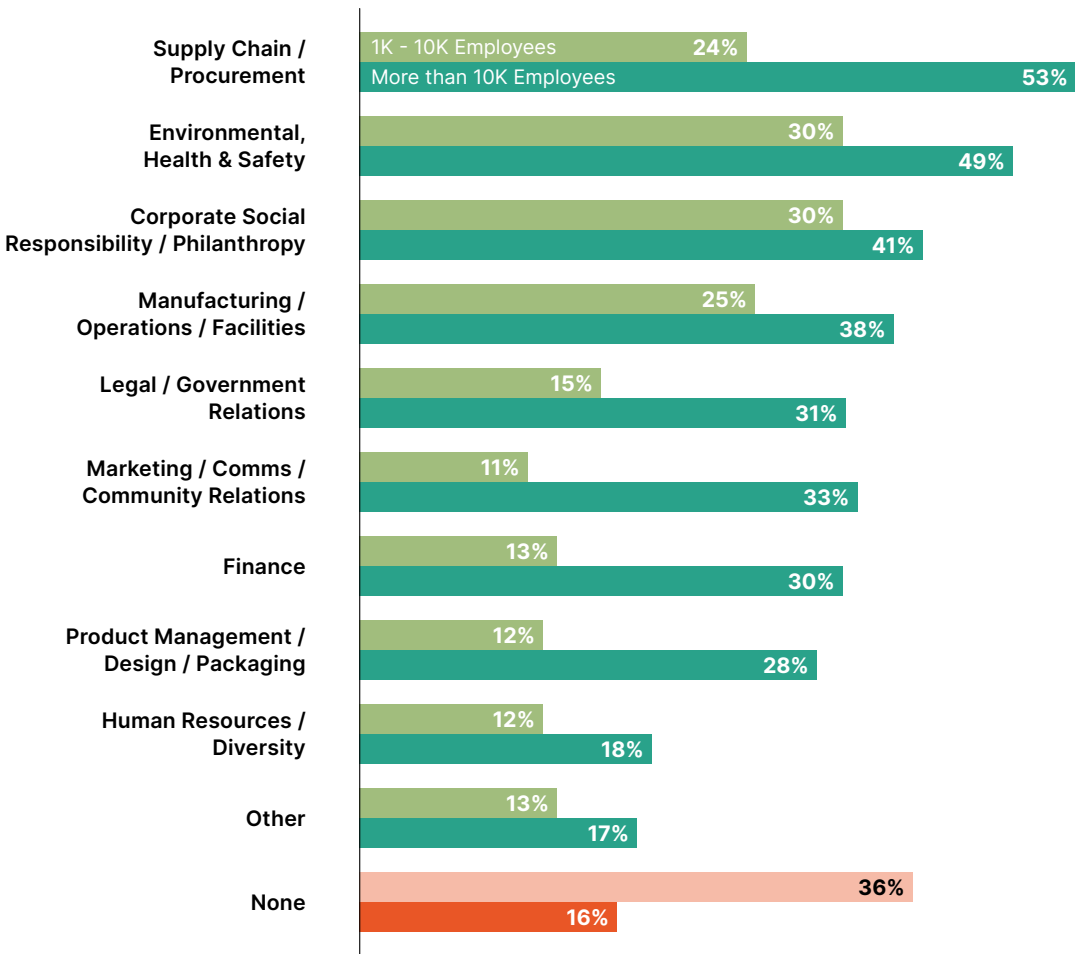
Comparing the number of people in core sustainability teams to those embedded around the company



We also looked at where exactly workers are embedded. At companies with fewer than 10,000 employees, they were most commonly found in the environmental, health and safety or corporate social responsibility departments. Larger companies were most likely to embed sustainability expertise in the supply chain or procurement units.

### Supply Chain and EHS are the most likely departments to have embedded sustainability expertise

Q: In which departments of your company are there people who are devoted primarily to sustainability and environmental issues?





# Staffing and Budget Levels

**As mentioned above, 46 percent** of the companies we studied increased staff and budgets, 25 percent cut them and the rest kept them flat or had a mix of cuts and increases.

When we asked about the forces driving these decisions, several clusters of companies emerged. Here they are, with a representative response from each:

## **True believers**

*“We have tied sustainability to our brand and culture for so long that we weren’t going to back off just because political winds shifted.”*

Sustainability director, U.S. building supply company

## **Return deliverers**

*“Our initial growth was fueled by senior leadership that wanted to create sustainability commitments. It catapulted forward when we were able to show the business value these programs can bring to our organization.”*

Sustainability product manager, U.S. real estate company

### **Compliance-focused**

*“We’ve had to add budget for third-party data assurance and create a sustainability data controller position.”*

Head of sustainability, U.S. chemical company

### **Resource shifters**

*“We cut staff to reinvest in AI, but our emissions have been growing, so we need to make substantial investments in solar, building electrification and EV charging.”*

Sustainability director, U.S. technology company

### **Appearance keepers**

*“Sustainability is viewed as important due to public commitments, but we’ve deprioritized spending because of an internal focus on cost-cutting.”*

Sustainability program manager, U.S. technology company

### **Dutifully distracted**

*“Our CEO decided to shelve a major investment in decarbonization, ignoring our public commitment, and invest in a high CO<sub>2</sub>-emitting asset in India.”*

Sustainability project manager, European metal company

### **Government-dependent**

*“Our organization was hit very hard by the actions and rhetoric from DOGE [Elon Musk’s Department of Government Efficiency] due to the number of federal project contracts we had. This has reduced our ability to invest in corporate sustainability and to talk about it in our communications, even though our commitments and collective attitudes toward it haven’t changed.”*

Sustainability analyst, U.S. research institute

### **Bailers**

*“We’ve shifted from leveraging sustainability as a market differentiator to doing the bare minimum.”*

Sustainability strategist, U.S. professional services company

### Flip-floppers

*“Two years ago, our sustainability team was two people, and it was clear that wasn’t enough to keep up with reporting, compliance and table-stakes sustainability. We grew to nine, then shrank again, and now we are back up to eight. Our capacity is still not enough to keep up with everything we need to do.”*

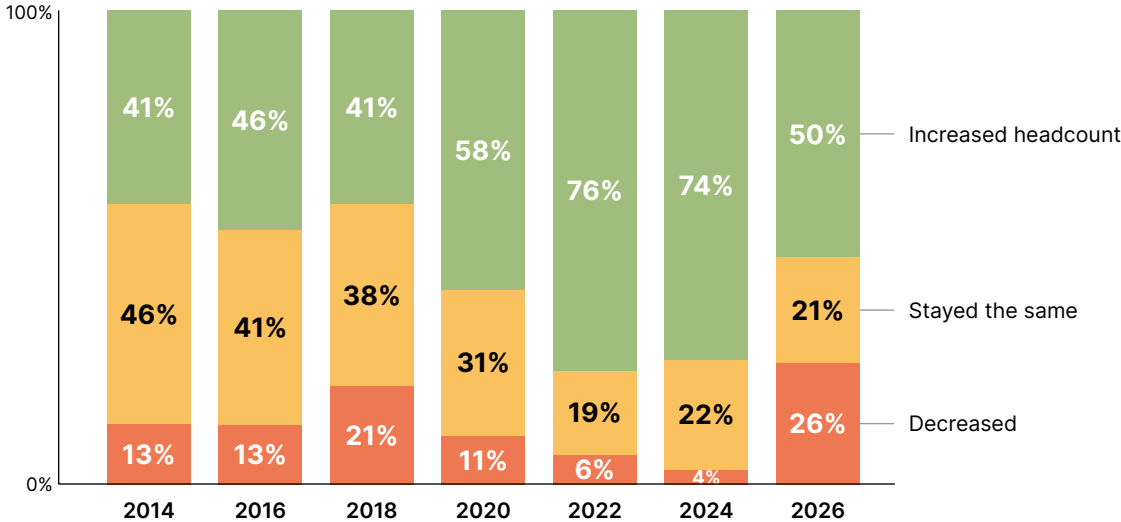
Sustainability director, U.S. consumer products company

## Sustainability headcount: expansion slows

A majority of businesses continued to expand their sustainability staff over the past two years, but with less vigor than earlier in the decade. In 2024, 74 percent of companies had increased their staff size, with only 4 percent cutting it. This year, 50 percent of companies added people and 26 percent reduced headcount.

### Fewer companies are growing their sustainability teams

Q: How has the number of people working on sustainability changed in the last two years?

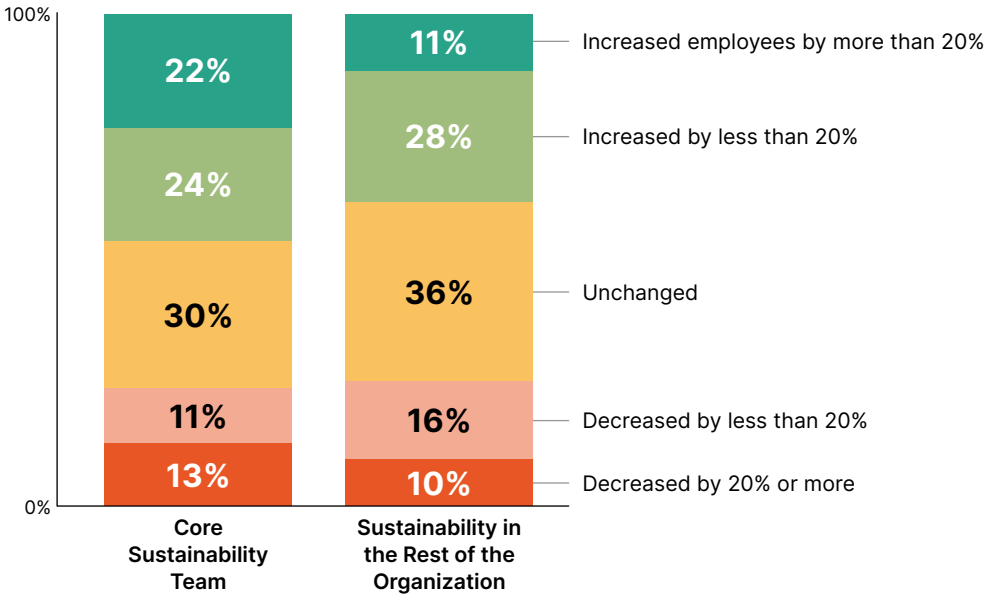


2026 figures are based on questions that separately asked about changes in headcount in the core team and the rest of the organization. Earlier surveys asked a single question about sustainability headcount.

When we looked at where in the organization headcount is changing, we found that increases are more likely in core sustainability teams than in embedded staff. Mostly, those two line items were linked. That is, companies that increased team headcount increased headcount for embedded employees, and vice versa.

**More companies are increasing core sustainability teams than embedded experts**

Change in number of people in core sustainability teams and those working primarily on sustainability in the rest of the company over the last two years



**Questions:** 1) Over the past two years, how has the number of people in the sustainability team changed and how much? 2) To the best of your understanding, what has been the change in the number of people working primarily on sustainability in the rest of the company over the last two years?

“Sustainability is viewed as important due to public commitments, but we’ve deprioritized spending because of an internal focus on cost-cutting.”

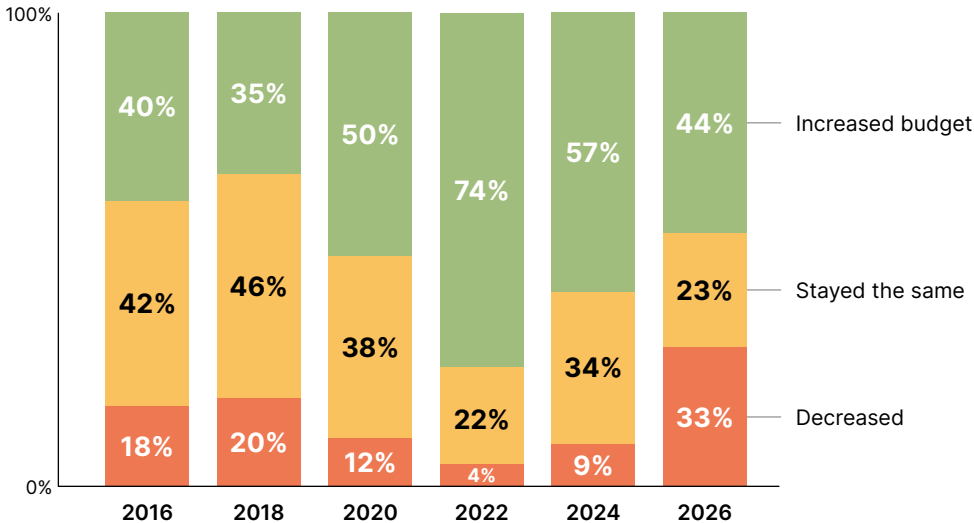
Sustainability program manager, U.S. technology company

# Sustainability budgets: more companies are cutting back

The story is much the same with budgets. One-third (33 percent) of companies have cut spending on sustainability (compared to only 9 percent two years ago). That’s the highest percentage of companies reducing spending that we’ve seen in the decade we’ve asked this question. Still, 44 percent said they had increased spending.

## One-third of companies are spending less on sustainability

Q: How has your sustainability budget changed over the last two years?



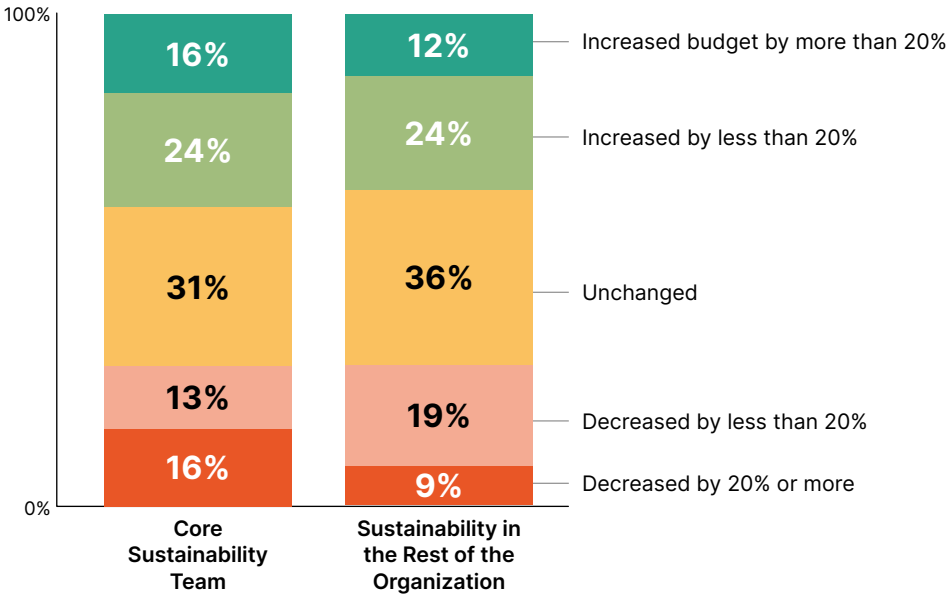
2026 figures are based on questions that ask about the change in spending separately for the core team and for the rest of the organization. Earlier surveys asked a single question about sustainability budgets.

How companies structure their sustainability organizations appears to have a significant relationship to spending patterns. Of companies where the sustainability team reports to the CEO, only 21 percent cut budgets. Of those that report to finance, 36 percent faced decreased funding.

As with headcount, budgets for the core sustainability team and sustainability efforts throughout the company move in tandem. Companies that increase one also increase the other.

## Budget cuts are falling equally on embedded sustainability workers and core teams

Change in budget for core sustainability teams and those working primarily on sustainability in the rest of the company over the last two years



**Questions:** 1) How has the budget for your sustainability team changed over the last two years? 2) To the best of your understanding, approximately how has your company's spending on sustainability (excluding the sustainability team) changed over the last two years?

“We have reprioritized on what is most achievable and most critical. That means some important basics get little attention, like embedding sustainability education across the company.”

Head of ESG, U.S. transportation company



# How Professionals Cope with Shifting Priorities

**Budgets and staffing levels** don't tell the whole story of life on the front lines of corporate sustainability. Even in companies that haven't cut back, there is growing frustration. Professionals see resources diverted to lower-impact projects, and they try to keep up when budgets aren't increasing as fast as the work to be done.

## Difficulty in achieving goals

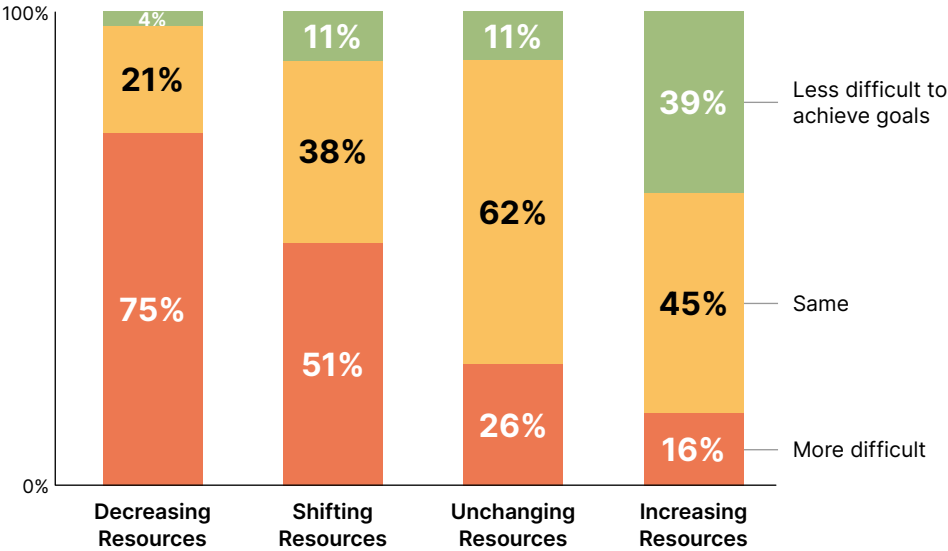
We asked professionals how the changes their companies have made to their sustainability organizations and resources have affected their jobs. For 38 percent, it's harder now to achieve their sustainability goals. Only 22 percent said their job has become easier.

At the largest companies, three times as many professionals said their jobs had gotten harder than said they were easier (44 percent versus 15 percent). In smaller companies, the results were more similar (33 percent versus 29 percent).

As you would expect, money can make things easier. At companies that increased their sustainability budgets, only 16 percent said their jobs had become harder, while 39 percent said their jobs had become easier. When budgets were cut, the picture reversed: 75 percent said their jobs were more difficult, and only 4 percent said their jobs were less difficult.

### It's not easy being green

Q: Have changes to your company's sustainability budget, staffing or structure over the last two years made it easier or more difficult to achieve your sustainability goals?



Change in sustainability headcount and budgets

**Change in sustainability headcount and budgets:** based on a combination of four questions about budget and headcount change for the core sustainability team and sustainability in the entire organization. "Shifting Resources" means there were increases in some categories and decreases in others.

## Increased reporting requirements

The biggest shift in corporate priorities, as we've said, has been an increased emphasis on compliance. So it's no surprise that sustainability professionals reported devoting more resources toward fulfilling government-mandated disclosure rules. Those requirements, of course, are in addition to the voluntary

disclosures that many companies have been making in recent years in response to requests from investors and customers.

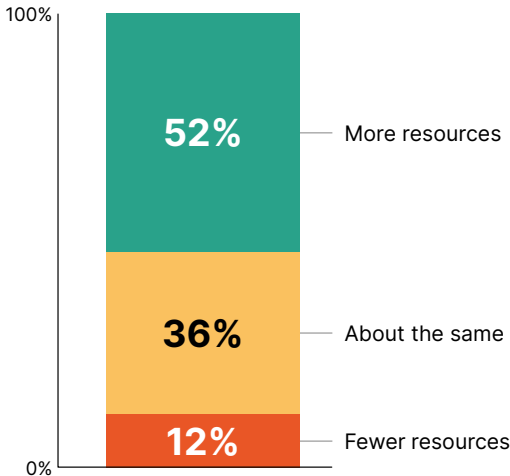
In our survey, more than half of the companies (52 percent) said they were devoting more resources to reporting than they did two years ago. (The 2024 survey phrased a question on this topic differently, to which 81 percent said they had hired more employees or consultants to address increased disclosure requirements.)

**“Impact-driven employees are disillusioned and exhausted by their jobs being driven by regulations.”**

Sustainability director, Swiss food company

# Half of companies are spending more time and money on sustainability reporting

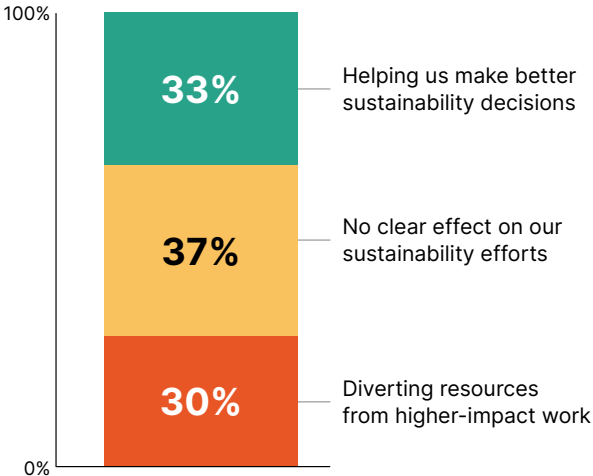
Q: How has your company's investment of time and money in sustainability reporting changed over the last two years?



Still, there was no consensus on whether the effort to measure and track climate efforts was worth the investment. About the same number of professionals said that reporting diverted resources from higher-impact work (30 percent) as said it helped them make better decisions (33 percent).

## How disclosure affects sustainability decisions

Q: How has the time and money you are putting into reporting affected your other sustainability efforts?



Question asked of those increasing resources for sustainability reporting.

# Coping strategies

As the public mood and management priorities shift, sustainability professionals are adapting as best they can. We asked respondents to tell us what they and their teams are doing differently. Their strategies mixed acceptance, defiance and finesse. Here's a categorical sampling:

## Learning new skills

*“The sustainability practitioner also needs to be able to speak the language of the CFO. By being data-oriented, operationally aware and financially fluent, you can build a business case for sustainability projects that leadership cannot say no to.”*

Sustainability director, U.S. energy company

## Winning over skeptics

*“In the current political climate, we must ensure that all our data is correct and prove our worth to groups and individuals who may have heard any misinformation.”*

Sustainability coordinator, U.S. food company

## Ignoring skeptics

*“We have become much more focused on doing our best work and having the most impact with the resources we have. We've become more internally focused and don't respond to all the raters and rankers. It's better to do the right thing than to pat ourselves on the back.”*

Chief sustainability officer, U.S. consumer packaged goods company

## Focusing on financial benefit

*“While we never framed our program as ‘doing the right thing,’ given the current political environment, we are leaning in extra hard to the cost savings we are driving and revenue we are bringing in.”*

Chief sustainability officer, U.S. consumer packaged goods company

## Using technology

*“Requests from customers for sustainability data about our products have increased dramatically. Rather than continuing to expand the team to handle them, we are focused on productivity via automation.”*

Vice president of sustainability, U.S. building supply company

### **Changing the pitch**

*“We’re finding causes that our right-leaning leadership resonates with. For example, we’ll talk about an investment in regenerative agriculture as ‘supporting rural small businesses, farmers and ranchers.’”*

Head of sustainability, U.S. financial services company

### **Aiming lower**

*“We’ve watered down everything we’re doing.”*

Sustainability analyst, U.S. building equipment company

### **Seeking environmental *and* financial benefits**

*“We’ve coped with significant reductions to our team by concentrating on initiatives that not only advance our long-term sustainability goals but also deliver measurable operational savings for the business. It’s been encouraging to see how well-designed projects can achieve both environmental and financial benefits.”*

Vice president of sustainability, Australian travel company

### **Keeping hope alive**

*“Every day, I try to focus on one thing I can do to make the world a better place and support my team in doing the same. We will keep fighting the good fight.”*

Chief sustainability officer, U.S. retailer

### **Sacrificing nice-to-haves**

*“We have reprioritized on what is most achievable and most critical. That means some important basics get little attention, like embedding sustainability education across the company.”*

Head of ESG, U.S. transportation company

### **Practicing patience**

*“I’ve realized that resolve and determination can only get me so far. Being flexible and patient is critical to avoid complete frustration and burnout.”*

Sustainability specialist, U.S. consumer electronics company

### **Fighting back**

*“Push and fight like your life depends on it. Where you’re given an inch, try to take a mile. Wherever there is a potential opportunity, try your darndest. A project might die, but never be the one to kill it.”*

Sustainability director, U.S. division of French food company

### **Working harder**

*“We’re working longer hours to increase sustainability impact when our budget and headcount are not increasing.”*

ESG manager, U.S. healthcare company

### **Minding the team**

*“We need to remind people of the joy of working on the solution and to avoid staying too long in the ‘pit of despair.’ If you keep people in crisis too long, they burn out and give up.”*

Sustainability manager, U.S. technology company



# Compensation

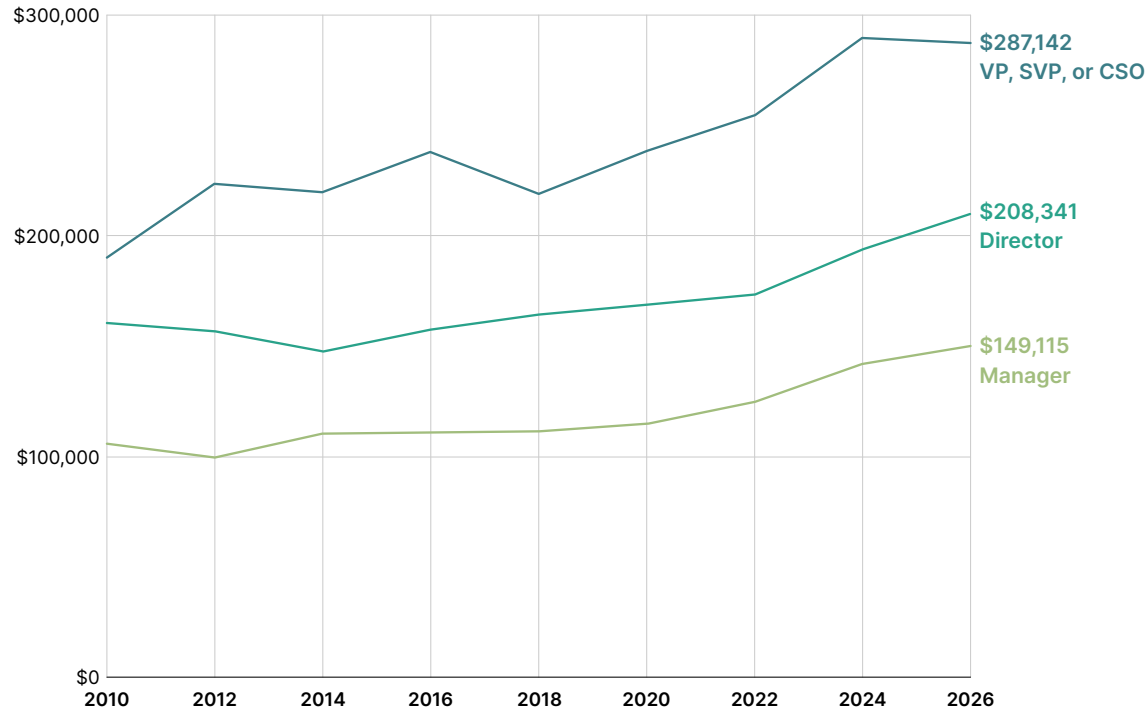
**Slowing growth in corporate sustainability** investments is definitely hitting professionals where it hurts: the pocketbook.

Overall, total compensation for sustainability professionals in the U.S. grew more slowly over the past two years than in the preceding period. And the pay packages of the most senior employees fell slightly from the period covered by our 2024 report. (Over the 16 years we have tracked compensation trends, pay for vice president-level and higher roles has been more volatile than that of mid-level and junior workers.)

- Manager base salaries averaged \$149,000, up 6 percent over two years. From 2022 to 2024, manager pay increased by 13 percent.
- Director salaries averaged \$208,341, up 8 percent. They grew 12 percent in the preceding period.
- Vice presidents, senior vice presidents and CSOs had salaries of \$287,000, down 1 percent, compared with a 17 percent increase in the previous survey.

### Salaries for senior sustainability professionals are leveling off ...

Q: What was your gross annual salary last year (not including bonuses or other forms of compensation) in U.S. dollars?



Data only includes people based in the U.S.

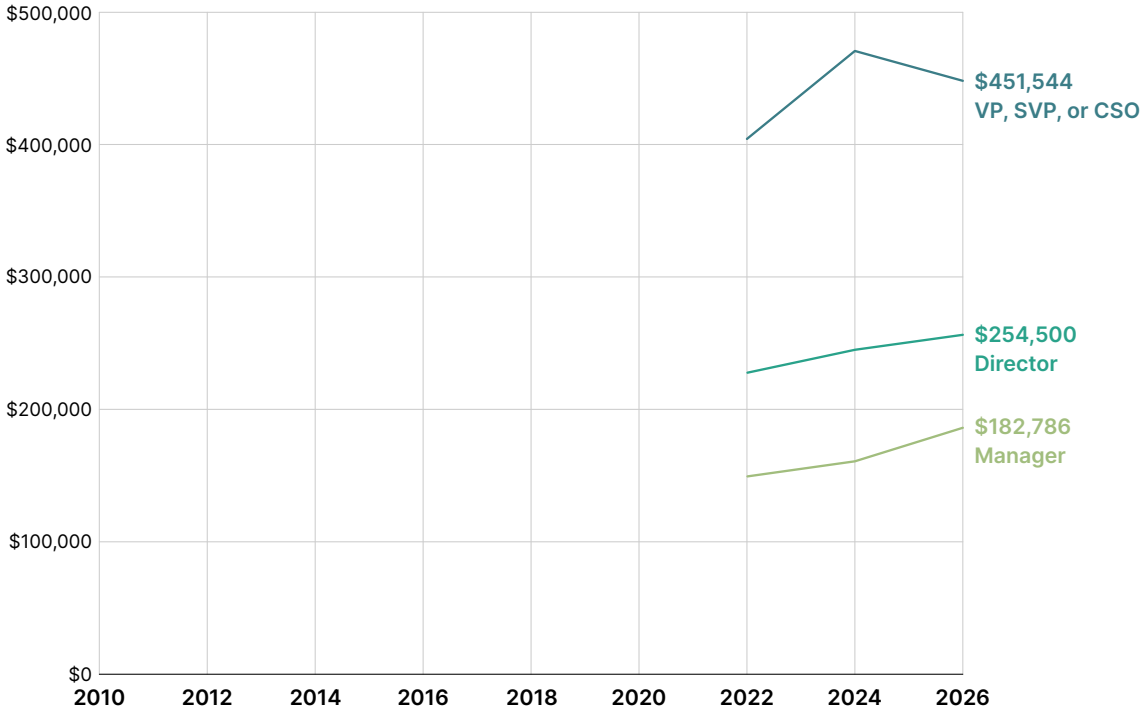
“We’re working longer hours to increase sustainability impact when our budget and headcount are not increasing.”

ESG manager, U.S. healthcare company

Beginning in 2022, we added a question about total compensation, including bonuses and exercised stock options. This year, the total pay of managers was \$183,000, up 15 percent; of directors, \$255,000, up 4 percent; and of VPs, SVPs and CSOs, \$452,000, down 4 percent.

**... and total compensation is falling**

Q: What is the total compensation (including base salary, bonus, exercised options and any other monetary compensation you expect to receive for the year) in U.S. dollars?

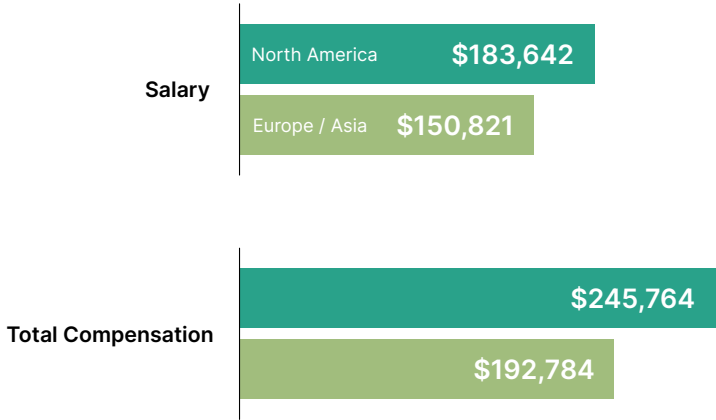


Data only includes people based in the U.S.

Sustainability compensation is higher in the U.S. than in the rest of the world. We didn't have enough responses to break out international pay by job title, but we were able to calculate that, for all roles, salaries are 18 percent lower in Europe and Asia than in North America. Total compensation is 22 percent lower.

# Sustainability compensation by region

Average 2025 salary and total compensation for workers at all job levels, by where they are located

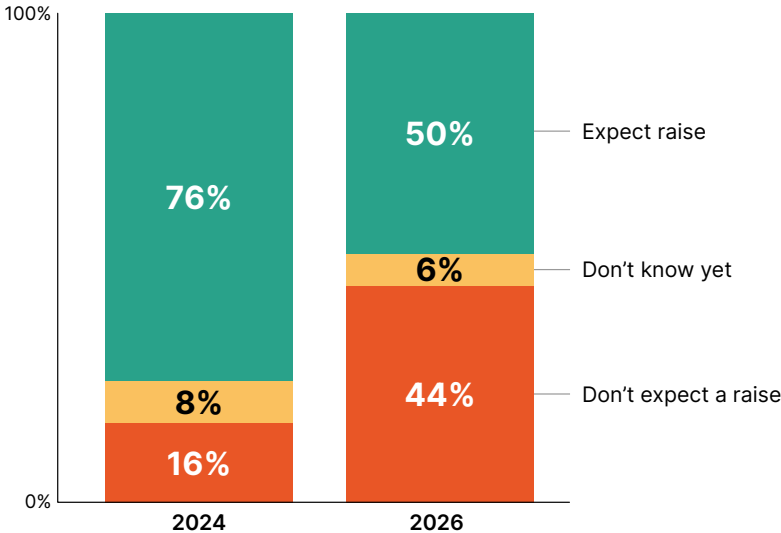


## Expectations

It may be a sign of the shifting priorities of business leaders that nearly half (44 percent) of those in our survey don't expect a raise in 2026. In 2024, 76 percent predicted their paychecks would go up.

### Nearly half of professionals don't expect a raise this year

Q: Do you expect your total compensation for the coming year to be more or less than it was last year?



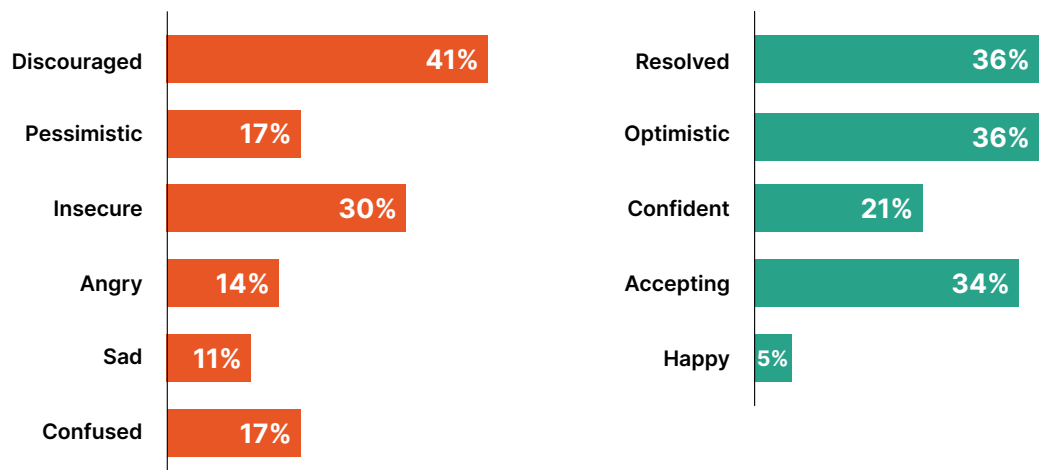
# How Professionals See the Profession

## Feelings about sustainability

We presented respondents with a list of 11 words and asked them to select the ones that best describe how they feel about their profession. The most common response was “discouraged,” selected by two-fifths (41 percent) of them. More than one-third (36 percent), though, said they were “optimistic,” and the same amount said they were “resolved.”

### Mixed feelings about the profession

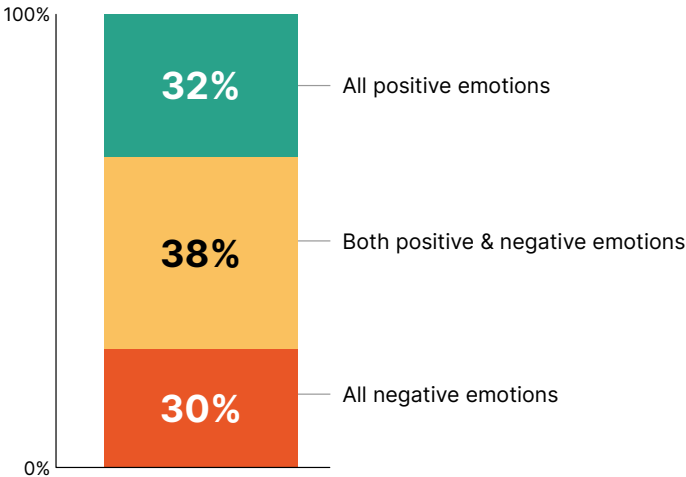
Q: Which of these words describes how you feel about the sustainability profession?



We characterized the responses as positive, negative or neutral. As people could select more than one, they often expressed a mix. Indeed, the respondents were divided into three groups of roughly equal size: those with only positive feelings, those with only negative feelings and those with some of each.

### Conflicting emotions

Q: Do the words professionals used to describe their feelings reflect positive, negative or mixed attitudes?



About one-third of the respondents added other words and phrases. The most common: “frustrated,” “determined” and “resilient.”

To find patterns, we distilled the words used — both our suggestions and those added by respondents — into clusters of similar meaning. Nearly half of the respondents (49 percent) used words similar to “engaged,” such as “focused,” “resolved” and “innovative.” Nearly as many (44 percent) used words like “exhausted,” such as “burnout,” “stressed” and “overworked.”

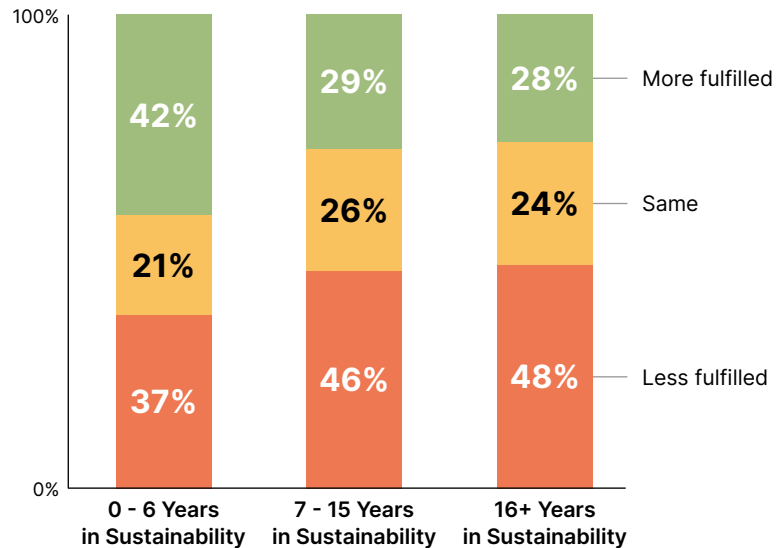
## Career fulfillment

For people who have devoted their lives to fighting climate change and building sustainable businesses, the resistance they now face from the government, sections of the public and, in some cases, their own management is hard to take.

Almost half (44 percent) said they are less fulfilled by their work than they were two years ago, while only 33 percent are more fulfilled. Dissatisfaction is higher among those with more time in the profession.

## The longer you've been working in sustainability, the less fulfilled you feel

Q: How has your level of professional fulfillment in your sustainability career changed over the last two years?



Other factors that relate to career satisfaction include:

- **Industry:** 58 percent of those who work in finance say their careers are less fulfilling.
- **Location:** Dissatisfaction is higher in the U.S. than in Europe and Asia.
- **CEO attitude:** At companies where the CEO is dismissive of sustainability, 64 percent say their careers are less fulfilling, compared with 21 percent who say theirs are more so. Where a CEO is engaged, only 35 percent are dissatisfied, while 37 percent are more satisfied.
- **Organization:** People in companies where the sustainability team reports to the CEO or corporate affairs are much more satisfied than those where it reports to legal, finance or marketing.

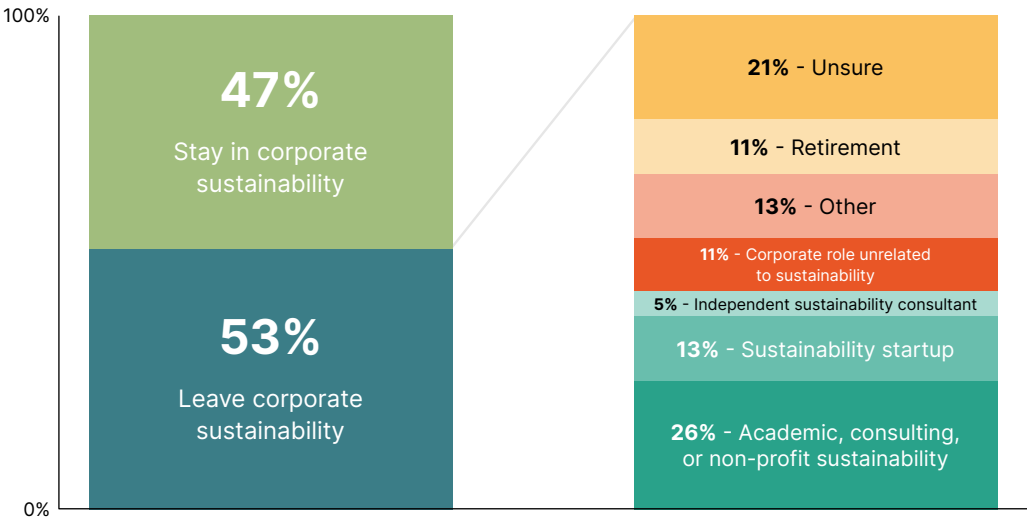
# Future plans

Nearly half (47 percent) of the professionals now working in corporate sustainability say that it offers the most appealing career path over the next five to 10 years. Another quarter (26 percent) want to continue working in sustainability, but on their own or at a startup, consulting firm, nonprofit or academic institution.

**Half of professionals want to leave corporate sustainability ...**

**... and of those, nearly half want a sustainability role in another kind of organization**

Q: Over the next five to 10 years, what career path would you find most appealing?

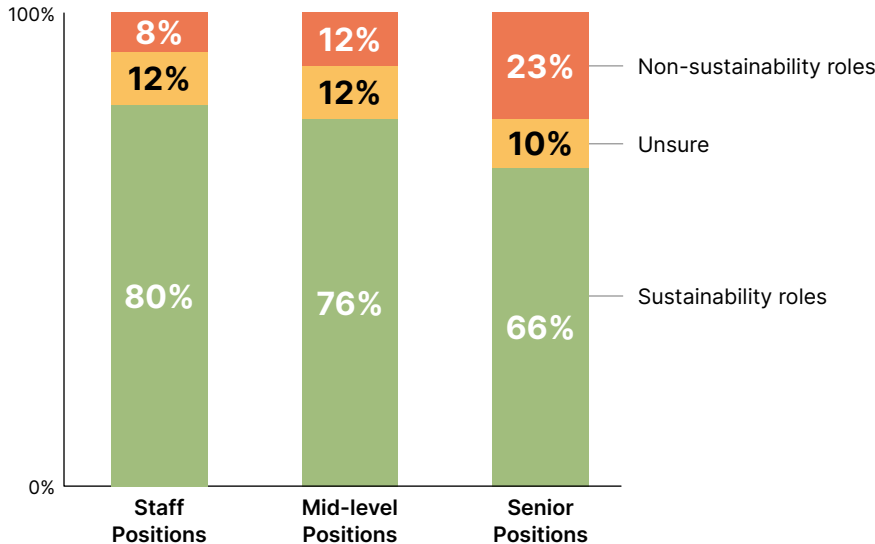


Perhaps not surprisingly, only 35 percent of those who said they weren't expecting a raise this year see themselves working in a corporate sustainability role in the future, compared to 56 percent of those who do expect a raise. Similarly, people who find their jobs more difficult or less fulfilling are less likely to stay in the field, as are those who work at companies whose CEOs they see as dismissive of sustainability.

Professionals in more senior positions were more likely to see themselves moving out of sustainability than middle managers and individual contributors. About half of the higher-ranking executives who don't want a pure sustainability role said they want a job in another business function. In some cases, they said they wanted to supervise multiple functions, including sustainability. Of the rest, interest was split between board positions, consulting, government and philanthropy. This analysis excluded people who said they wanted to retire in five to 10 years.

## More senior professionals want to leave the profession

Preferred career path over the next five to 10 years by job title



**Question:** Over the next five to 10 years, what career path would you find most appealing? **Senior Positions:** These are vice president level and above. **Mid-Level Positions:** directors and managers. **Staff Positions:** Individual contributors. **Excludes** respondents who said they plan to be retired.

“We have tied sustainability to our brand and culture for so long that we weren’t going to back off just because political winds shifted.”

Sustainability director, U.S. building supply company

# Professionals Who Left Sustainability Jobs

While our survey has traditionally focused on professionals employed in sustainability roles, given the industry disruption this year, we added a few questions for people who previously worked in the field.

We had 58 respondents who had left corporate sustainability jobs. Most had been laid off. The rest had resigned, moved to a non-sustainability role or retired.

Most of those whose jobs were eliminated said their companies simply decided to shift resources, often ignoring or withdrawing public promises they had made.

“The last two years have been a wild roller coaster from celebrating heightened commitments to feeling under attack and resolving to persevere,” wrote a former sustainability official at an energy company, with more than 15 years of experience in the field. “They told our under-resourced team that we were not going to be cut, but when the politics changed, we were.”

Some trace their job loss directly to the political environment.

“Under the new U.S. administration, companies don’t want to talk about sustainability anymore, so we lost support from executive leadership,” noted the former head of U.S. sustainability for a large European manufacturing company. “Also, with the cost pressure due to tariffs, the team was an easy target for headcount reductions.”

Others blame technology. “I was in a top senior role until AI took over and the role was paused,” observed a former sustainability leader at a consulting company.

When asked about their current status, roughly half said they were looking for work. A minority said they were working in sustainability independently or with consulting, academic or nonprofit organizations. Looking ahead, most said they want to stay involved in sustainability in some form.

One respondent in their early 20s, for example, was forced to move to a position unrelated to sustainability after their role was eliminated but wants to return to the profession if possible. “It is harder to find roles in the field,” they wrote. “I’m a little discouraged, but I keep trying!”

Some, though, have soured on the field. “It feels pointless,” commented one professional, who was told not to return to work after taking a family leave. “Companies don’t actually want to make a difference. They just want to check a box for reporting compliance and investors.”



# Looking Forward

**In this study, we've captured** snapshots of the sustainability profession in 2026 from many angles. Putting them all together creates a vivid portrait of a field whose practitioners are — to use the words of survey participants — both discouraged and resolved.

For anyone thrilled to see the ascendance of sustainability in the early years of this decade, it's likely a punch in the gut to see the movement — which has so much influence over our collective future — pushed back into the shadows.

Still, if some companies and some professionals have decided that this is no longer their battle to fight, most are determined to pick themselves up, learn from their mistakes and continue stronger and wiser.

The exact lessons that can be learned from the past two years are still emerging. Some say companies must bind sustainability strategies tightly to financial objectives.

“We have to keep connecting the benefits of sustainability to business,” wrote a sustainability director at a U.S. agricultural products company. “We must measure, demonstrate impact and advocate. Nobody else is going to do that for us, and they certainly won't do it because it's ‘the right thing to do.’ It must make business sense.”

Other survey respondents contend that the biggest challenge is persuasion.

“Changing organizations from within is a strange, brutal and often unrewarding game,” argues a sustainability lead at a U.S. energy company. “The next phase in sustainability will be winning hearts, not minds, through psychology, emotional attunement and adaptive interventions in complex systems.”

Yet for some veterans in the field, neither emotional persuasion nor logical cost-benefit analysis can replace the objective that has always been central to the sustainability movement: a vision of business operating in harmony with the environment.

“Our work has to focus on what is most material, pushing for the transformations that produce the greatest benefit for all,” said the CSO of an American beverage company. “If we are not bold as practitioners, we risk becoming obsolete.”

# Appendix

## About the State of the Sustainability Profession

The *Trellis State of the Sustainability Profession* dates back to 2010, when GreenBiz, as we were known then, surveyed the salaries of sustainability professionals. We have conducted it every two years since then, adding topics as the profession has grown.

The current report is based on an online survey conducted in January and February 2026. Participants were recruited from readers of the Trellis Briefing newsletter and Trellis.net website, attendees of Trellis events, members of the Trellis executive network, social media and referrals by other sustainability professionals and publications. As such, companies that employ few sustainability professionals are likely to be under-represented.

We received 1,073 valid responses after filtering out incomplete surveys and responses from people who were not directly involved in sustainability. Most of the results are based on 548 responses from people who work for organizations with \$1 billion or more of annual revenue. Of this group, 86 percent were from North America and 14 percent from Europe and Asia, which were combined to provide a statistically valid group. Compensation data is based only on respondents in the U.S. Additional demographic information is below.

The survey included several open-ended questions, inviting respondents to provide context for their answers and address issues we didn't ask about. Many of these comments are included in this report without identifying the name or company of the respondent.

Note that in the charts and tables, figures may not add up to 100% because of rounding.

## About Trellis Group

Trellis Group is the leading content and convening company for sustainability professionals. Its key offerings are the events GreenBiz and Trellis Impact, a peer membership network, the Trellis Briefing newsletter and industry reports like this one.

## Acknowledgments

Trellis would like to thank partners who helped produce the 2026 State of the Sustainability Profession report. Thank you to Saul Hansell, who wrote the report and designed the survey and analyzed the data on which it is based, and Gary Belsky and Neil Fine, of Elland Road Partners, who edited it.

# Who responded

Region	
United States	<b>84%</b>
Europe	<b>11%</b>
Asia/Pacific	<b>3%</b>
Canada	<b>2%</b>
South America	<b>1%</b>

Company revenue	
Greater than \$10 billion	<b>51%</b>
\$1 billion – \$10 billion	<b>49%</b>

Employees	
Greater than 10,000	<b>70%</b>
1,001 – 10,000	<b>27%</b>
101 – 1,000	<b>3%</b>

Job level	
Sr. Vice President/ Vice President/CXO	<b>17%</b>
Sr. Director/Director	<b>32%</b>
Sr. Manager/Manager	<b>33%</b>
Individual Contributor/Staff	<b>17%</b>

Industry	
Technology	<b>13%</b>
Food and Beverage	<b>11%</b>
Consulting and Professional Services	<b>9%</b>
Heavy Industry/Industrial Manufacturing and Services	<b>7%</b>
Retail and Fashion	<b>7%</b>
Financial Services	<b>7%</b>
Built Environments/ Construction/Real Estate	<b>6%</b>
Healthcare/Biotech/Pharma	<b>6%</b>
Consumer Packaging (incl. Beauty)	<b>5%</b>
Transportation	<b>4%</b>
Energy	<b>3%</b>
Hospitality	<b>3%</b>
Chemicals	<b>3%</b>
Media/Communications	<b>3%</b>
Paper and Packaging	<b>2%</b>
Insurance	<b>2%</b>
Aerospace and Defense	<b>2%</b>
Agriculture and Forestry	<b>2%</b>
Leisure/Sports and Recreation	<b>1%</b>
Universities and Education	<b>1%</b>
Telecommunications	<b>1%</b>
Law Firms	<b>1%</b>

Role at organization	
Oversee sustainability and other functions	9%
Head of sustainability	30%
Report to the head of sustainability	33%
In sustainability department	12%
Sustainability role in another department	9%
Investment or finance	1%
Sustainability vendor or consultant	6%

Tenure in sustainability	
3 years or less	10%
4 – 6 years	19%
7 – 10 years	21%
11 – 15 years	22%
16 – 25 years	23%
More than 25 years	5%

Education	
Master's or MBA in sustainability	33%
Bachelor's degree	27%
Other master's or graduate degrees	18%
MBA (not specifically in sustainability)	15%
Ph.D.	7%

Gender	
Female	61%
Male	36%
Prefer not to answer	3%
Non-binary or transgender	0.4%

Race	
White or European	78%
Latinx	4%
Prefer not to answer	4%
East Asian	4%
South Asian	4%
Black	1%
Other	1%
Middle Eastern	1%
Southeast Asian	1%

Age	
Under 25	1%
25 – 29	10%
30 – 34	17%
35 – 40	20%
41 – 50	33%
51 – 60	18%
61 – 70	2%