



# Subsurface Oil & Gas Employment Insights 2022/23 Edition - Australia

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# Introduction

## Welcome to the third annual Patch Personnel Subsurface Oil and Gas Industry Employment Insights Report for Australia.

Our aim with this report is to bring you accurate and useful data from across the sector, combining remuneration trends and salary benchmarks with general employment insights. Employees and business owners alike can use this information to make informed, evidence-based decisions about what to do with their plans in the coming 12 months.

As you will see in our survey findings, many of the trends seen last year have continued. The industry has settled further in the wake of COVID -19, returning to a more predictable business as usual, but issues remain, placing pressure on employers.

Notably, there is a sentiment that this is a talent-short, candidate-led recruitment market. Whilst, in my view, this is not an immediate challenge when hiring for subsurface professionals it is already evident in many sectors and we should be ready to adapt if the market changes. Employees are in hot demand in candidate-led markets, and remuneration is at the forefront of their needs, along with a better work / life balance. Employers will need to learn to tune in to what candidates want, and let go of what they do not.

As ever, if you would like to discuss these findings in more detail, please contact me or one of my team.

### David Styles

Managing Director  
Patch Personnel





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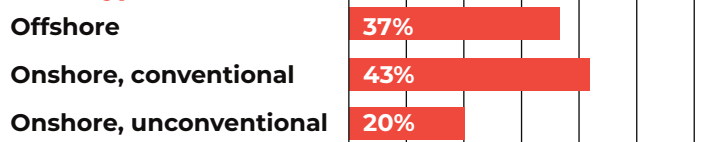
# Key Findings

- 81% of respondents have a permanent role in the industry, followed by 11% who are self-employed. Unemployment has crept up this past 12 months, rising from about 4% to 8%.
- Many unemployed respondents (47%) appear to be contractors whose contracts simply concluded, and they've yet to find more work.
- 21% of employees resigned from their job this year, compared to 7% last year.
- 42% of respondents are contemplating leaving the oil and gas industry entirely, a 17-point reduction from last year's 59%. Work instability, lack of employment opportunities and reduced pay were cited as the top three reasons.
- Employers appear aware that staff are leaving, in part, for reasons of pay - 53% increased pay rates this year, a doubling on the same result from our prior survey.
- 73% of respondents received extra benefits or incentives on top of their regular pay, slightly up from 71% last year but still down from 80% the year before.
- When considering a new job opportunity, the most important factors for employees are remuneration, company culture and work/life balance.
- When considering a new job opportunity, the least important factors are career progression, professional development and flexible work arrangements.
- Nearly 80% of employees want to keep occasionally working from home. Employers feel similarly, with 85% planning to keep it in some capacity.
- More than half of employees feel the new gas price cap will damage their industry, though employers don't indicate they feel it will change their strategic plans.
- 15% of Companies who participated will not be continuing Work From Home (WFH) arrangement.
- Only 13% of respondents had 0-10 years of experience. The remaining 87% had 10 years+ and 49% of all respondents had 20+ years' experience. This shows an aging work force and a lack of new entrants to the sector.

# About the Participants

This year, we gathered responses from 26 Employers (Companies) and 247 Employees (individuals) working across Australia – all states with oil and gas activities were represented – mostly from Queensland and Western Australia – and covered onshore and offshore as well as a mix of conventional and unconventional assets. As with last year, and the year prior, just over two-thirds are employed on a permanent basis, with roughly one third employed as contractors.

## Asset Type



## Location



Other demographic details include:

## Education

Bachelor's Degree	20%
Honour's	23%
Master's Degree	41%
MBA	5%
No Degree	3%
PhD	8%

## Years of Experience

1-5	3%
6-10	10%
11-15	15%
16-20	23%
21-25	16%
26-30	12%
30+	21%

## Seniority Level

Junior	5%
Intermediate	16%
Senior	55%
Lead/Principal/Chief	24%

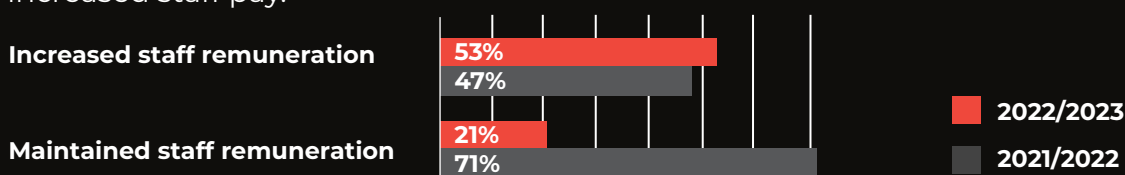
\* Across our survey, respondents were often able to choose more than one answer, leading to results which add up to more than 100%.

# Salary and Remuneration Trends

## Reviews to staff remuneration since July 2022

From the employers who chose to discuss whether or not they increased their employees' salaries, and at what rate, of those who responded, 56% said they offered a raise of 5% or higher, and a further third offered 3%.

As for whether or not they reviewed their salary offerings generally, 53% stated that they increased staff remuneration for permanent and contracted staff, leaving 47% who maintained similar levels. This is more than double last year's result, where only 21% increased staff pay.



Further than that, 7% also reduced their total working hours for staff (half of those who did so last year), while 4% increased working hours - leaving 89% who maintained the status quo.

### Changes since July 2022:

Remuneration		Hours	
Maintained staff remuneration	47%	Maintained working hours	89%
Increased staff remuneration	53%	Increased working hours	4%
		Reduced working hours	7%

## Salary

The following pages contain salary averages, organised by job title, seniority and specialisation where data was available. The categories presented in the table below have been established as a reference. Actual salaries may vary according to the company, person and each role's responsibilities.

Seniority	Junior	Intermediate	Senior	Lead/Principal/Chief
Years of Experience	0-5	6-10	11-15	16+

The salary figures presented here were retrieved from our questionnaire, market research, and current market knowledge based on our years of experience and active involvement in the industry.

Have questions, or require updated information on salary brackets? Contact:

**David Styles**

✉ david.styles@patchpersonnel.com

☎ 0474 494 891

**Kay Watts**

✉ kay.watts@patchpersonnel.com

☎ 0419 049 596



# O&G Salary Trends Australia 2022-23

Management	2021/22		2022/23		Annual	Day Rate
	Median Annual	Median Day Rate	Median Annual	Median Day Rate		
Drilling and Completions Manager	\$272,500	\$1,700	\$286,500	\$1,600	5%	-6%
Exploration Manager	\$265,000	\$1,850	\$242,500	\$1,675	-8%	-9%
Subsurface Manager	\$274,500	\$1,950	\$297,500	\$1,800	8%	-8%

Completions Engineer	2021/22		2022/23		Annual	Day Rate
	Median Annual	Median Day Rate	Median Annual	Median Day Rate		
Junior	\$95,000	\$625	\$95,000*	\$625*	0%	0%
Intermediate	\$142,500	\$900	\$142,500*	\$1,450	0%	61%
Senior	\$185,000	\$1,350	\$180,000	\$1,275	-3%	-6%
Lead/Principal/Chief	\$272,500	\$1,500	\$272,500	\$1,800	0%	20%

Drilling Engineer	2021/22		2022/23		Annual	Day Rate
	Median Annual	Median Day Rate	Median Annual	Median Day Rate		
Junior	\$87,500	\$600	\$120,000	\$600*	37%	0%
Intermediate	\$130,000	\$750	\$180,000	\$1,000	38%	33%
Senior	\$262,000	\$1,200	\$232,000	\$1,425	-11%	19%
Lead/Principal/Chief	\$280,000	\$1,625	\$246,000	\$2,000	-12%	35%

Drilling Supervisor (OCR)	2021/22		2022/23		Annual	Day Rate
	Median Annual	Median Day Rate	Median Annual	Median Day Rate		
Drilling Supervisor (OCR)	-	\$1,400	-	\$1,500	-	7%



	2021/22		2022/23			
<b>Geologists</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Annual</b>	<b>Day Rate</b>
Junior	\$120,000	-	\$118,000	\$800	-2	-
Intermediate	\$112,500	\$550	\$138,000	\$1,000	23%	82%
Senior	\$145,000	\$1,190	\$176,000	\$1,500	21%	26%
Lead/Principal/Chief	\$220,000	\$1,650	\$255,000	\$2,060	16%	25%
Development	\$179,000	\$1,080	\$262,500	\$950	47%	-12%
Exploration	\$175,000	\$1,000	\$135,000	\$1,500	-23%	50%
Operations	-	\$1,625	\$198,000	\$1,625	-	0%
Wellsite	-	\$1,075	-	\$1,200	-	12%

<b>Geophysicist</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Annual</b>	<b>Day Rate</b>
Junior	\$105,000	\$550	\$105,000*	\$550*	0%	0%
Intermediate	\$152,500	\$700	\$167,000	\$700*	10%	0%
Senior	\$205,000	\$1,000	\$200,000	\$800	-2%	-20%
Lead/Principal/Chief	\$270,000	\$1,225	\$265,000	\$1,325	-2%	8%

<b>Petroleum Engineer</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Annual</b>	<b>Day Rate</b>
Junior	\$92,500	\$550	\$92,500	\$350	0%	-36%
Intermediate	\$125,000	\$800	\$150,000	\$1,100	20%	38%
Senior	\$192,000	\$1,300	\$209,250	\$1,200	9%	-8%
Lead/Principal/Chief	\$280,000	\$1,500	\$260,000	\$1,400	-7%	-7%

<b>Reservoir Engineer</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Annual</b>	<b>Day Rate</b>
Junior	\$95,000	\$575	\$95,000*	\$575*	0%	0%
Intermediate	\$135,000	\$850	\$185,000	\$850*	37%	0%
Senior	\$213,000	\$1,200	\$215,000	\$1,200	1%	0%
Lead/Principal/Chief	\$291,500	\$1,150	\$273,000	\$1,500	-6%	30%

	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Median Annual</b>	<b>Median Day Rate</b>	<b>Annual</b>	<b>Day Rate</b>
Petrophysicists	-	\$1,500	-	\$1,820	-	21%

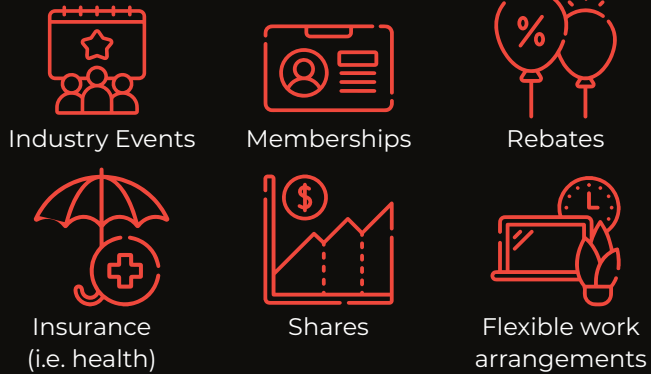
# Benefits and Bonuses

Every year we ask employees whether or not they receive any other benefits or incentives on top of their regular pay rate. Figures this year held fairly steady compared to last year, with 71% answering yes last year and 73% answering the same this year. Both remain lower than our 2020-21 survey, where 80% received extra benefits.

## Types of Benefits Offered

Short term incentives (cash bonus)	59%
Long term incentives	27%
Other	14%

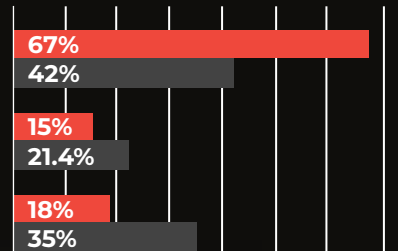
## Types of Benefits Offered



Employers paid bonuses

Employers did not pay bonuses, but have done in the past

Employers did not pay bonuses and have never done so



2022/2023

2021/2022

# Unemployment, and Why Employees Leave

Unemployment has increased somewhat since last year. Previously, just over 80% of respondents had a permanent role, leaving 16% self-employed and the rest unemployed (4%). This year we have indicated that there are 58% permanently employed, but 8% said they currently have no work. Approximately 34% were contractors / self-employed.

Changes in Employment Status	2021/22	2022/23
Unemployed	4%	8%
Permanent staff	62%	58%
Contractor / Self-employed	34%	34%

Like last year, the majority of respondents maintained their employment status over the 12-month survey period. With 28% changing (an increase of 7 percent from last year's 65%, and 12 percent from 2020/21's 60%.)

From the looks of the data, it would appear that many unemployed respondents were contractors (47%), whose contracts had concluded, and who haven't found new work yet.

A significant change from last year is the rate of resignation among employees. In 2021-22, approximately 7% of respondents said they had resigned from their job. That figure has grown to 21% in 2022/23.

## Reasons for Unemployment

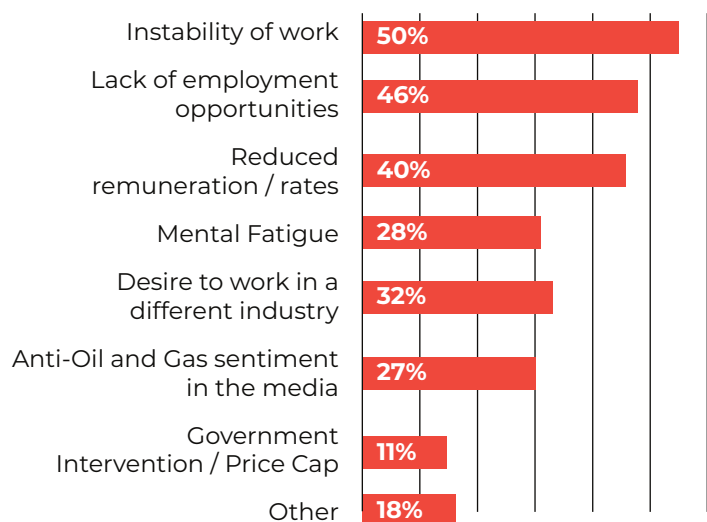
Contract finished and currently unemployed	47%
I resigned and currently unemployed	5%
I was made redundant and currently unemployed	21%

## Considering leaving the industry

Additionally, just less than half (42%) of respondents claim to have contemplated leaving the oil and gas industry entirely in the past 12 months.

"Reduced remuneration" was the third-most commonly cited reason why, rising from 25% last year to 40% this year. That's a lot of staff feeling their pay is too low, but data suggests employers must already be aware, given so many increased their salaries since our last report.

## Reasons for Contemplating Leaving



Of those employees who did leave their role, 37% were offered an exit interview and 19% received some form of outplacement service. This is quite a bit higher than our previous findings, where only 10% of respondents received an exit interview.

# Job Hunting in 2023

We know that a sizable portion of oil and gas industry workers are on the hunt for new employment. In fact, 14% are actively applying for jobs and 63% would jump ship for the right role. Only 20% said they aren't interested.

This might seem dire, but it may actually be a positive change. Those actively applying for roles in 2021-22 were as high as 36%, and 53% said they would resign for the right role. So, with resignations up and active job searching down, we could be seeing some settling of post-COVID instability - last year's biggest flight risks may have already resigned, reducing the risk this year. We'll need to check next year's data to know more.

## Factors which would hold someone back from job hunting include:

### Reasons for Staying in Current Role

Happy in my current role	42%
Possible recession	18%
Uncertainty due to oil prices	22%
Other	17%

### Reasons for Wanting a New Role

New challenge	43%
Increase of remuneration	35%
It was time for a change	23%
Relocation to another area	11%

### What other factors contribute to wanting to resign?



A need for stability



Frustration with management



Lack of opportunity in current role

The most important things employees look for in any new role remained the same from 2021-22 to 2022-23: remuneration, company culture and work/life balance. This year we also asked about stability of employment for the first time, which, when combining all respondents who answered "very important, fairly important or important", came in fifth.

	Very important	Fairly important	Important	Slightly important	Not at all important	No opinion
Remuneration	47%	33%	17%	2%	0.4%	0.4%
Flexible work arrangements	28%	32%	18%	15%	6%	0.4%
Professional development	22%	28%	28%	15%	7%	0.4%
Career progression	25%	22%	21%	15%	15%	1%
Work/life balance	43%	30%	18%	7%	1%	0%
Company culture	47%	26%	19%	6%	1%	1%
Location	34%	30%	20%	11%	5%	0.4%
Stability of employment	32%	24%	27%	13%	3%	0.4%





Most job seekers are interested in a full-time, permanent staff position (65%). But the experience looking for a job has been mixed, to say the least. 46% said that response times are too slow or they don't get a response at all, and 30% said they only sometimes get a response. Just 25% claimed response times were good.

### What about employers?

Of the employers we spoke to, most either increased their staff headcount or maintained the same (essentially the same as last year), although there was a slight increase in bringing on contractors.

#### Staff Headcount Changes

Decrease	19%
Increase	41%
Stay the same	41%

#### Contractor Headcount Changes

Decrease	7%
Increase	56%
Stayed the same	37%

#### Willingness to Hire Visa Workers

Willing	48%
Not Willing	52%

This year we asked whether or not employers would consider hiring workers on visas. It was a close split between those who would and would not, at 52% (against) 48% (willing). Still, despite being willing to hire staff on visas, most (81%) did not within the past year.

# About Working from Home (WFH)

A similar number of respondents this year to last hope to keep working from home in some capacity - 80%, compared to last year's 85%.

## In What Capacity Would You Keep WFH?

Depends on my work	26%
1 day per week	15%
Up to 2 days per week	17%
Up to 3 days per week	15%
Up to 5 days per week	7%
Don't Want	20%

Also like last year, most respondents were ambivalent about the idea of WFH being cancelled by their employer. 49% are OK with the idea, recognising that WFH was only in place due to COVID-19. That leaves a combined 45% who would be unhappy. 11% would be so unhappy, in fact, that they'd look for alternative employment if it came to pass.

**15% of Companies confirmed that they do not intend to continue WFH arrangements.**

## Feelings About Employer Cancelling WFH

I would consider looking for alternative employment	11%
I'd be unhappy, but would accept the decision	34%
No problem, it was only in place due to COVID-19	49%
Other	6%

## Employers WFH Intentions

1 day per week	19%
Up to 2 days per week	26%
Up to 3 days per week	7%
Depends on the person and their role	33%
Discontinue it	15%



# Outlook for 2024: Employees

From an employee perspective, the outlook for 2024 could be one of change. Subsurface professionals are open to changing roles. Salaries will probably nudge up a few percentage points as employers look to better meet the demands of their people, and there's not likely to be a big influx of staff coming in on visas to dislodge the current labour trends.

That said, individual workloads may continue to increase. Last year, we found that people's working hours had increased. This year, we found that individual workloads had also increased. 53% said they're now doing more work (42% stayed the same), and the top reason is that there are "less people to do the work."

There is also the threat of recession to consider. Does that affect respondents' willingness to change jobs? The majority, 42%, said it does not concern them. 39% are concerned, but would still be willing to change employers for the right role.

## Reasons for Change in Workload

Less people to do the work	46%
More busy	34%
The company expects it	19%

When asked if they would consider contracting 70% said that they would, although 30% would not.

## Reasons to Avoid Contracting

I currently working in a permanent position	64%
Short term work doesn't suit my lifestyle	17%
I don't really understand how it works	1%
Easier to purchase/rent property with a permanent job	15%
Other	4%

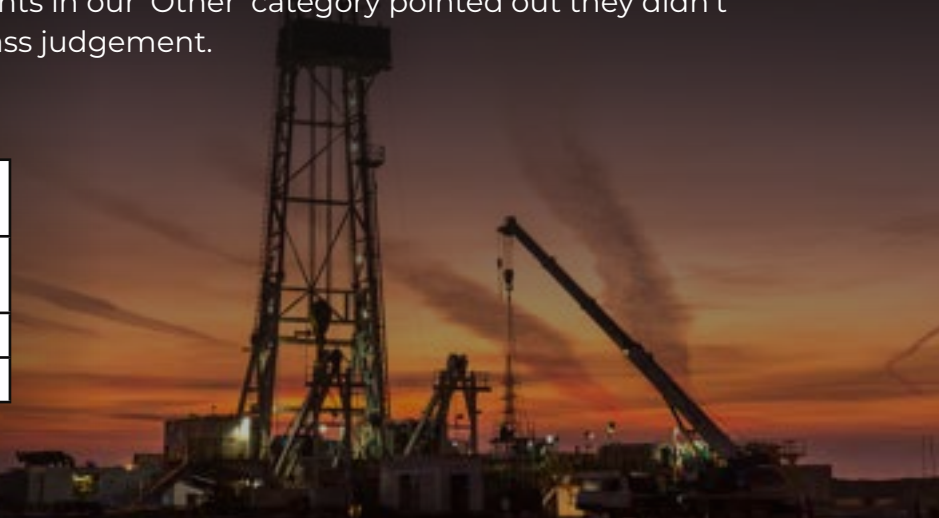


## The Gas Price Cap

Lastly, we asked how employees viewed the gas price cap. Just more than half (57%) think it's a bad thing which will damage the industry. Only 12% viewed it in a positive light. Although, many respondents in our 'Other' category pointed out they didn't understand it well enough to pass judgement.

## Views on Gas Price Cap

It's a bad thing that is damaging to our industry	57%
It's a good thing that helps to control prices	12%
Other (please specify)	10%
We just need to accept it	21%



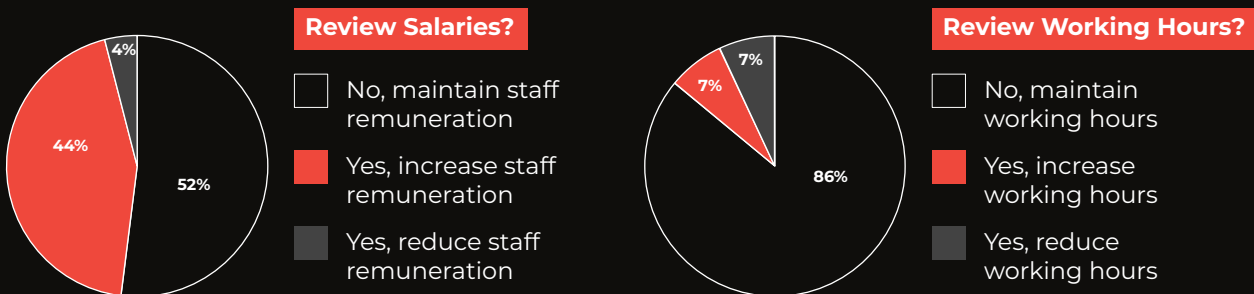


# Outlook for 2024: Employers

Moving ahead to the 2023-24 period, employers must think hard about employee loyalty. Reviewing salaries over the last 12 months will likely have helped stem the outflow of talent, but if workloads continue to increase it could counterbalance those gains. That said, staff headcount is already on the increase and, as we will see below, looks like it will continue to climb. At least, that is the intention. Availability of talent is a concern, and may hamstring the ability of employers to solve this challenge.

On the salary front, employers we spoke to indicated that they intended to maintain staff remuneration over the coming few months, although it was close to a 50:50 split. Working hours, meanwhile, will be neither increased or decreased.

## In the Coming Months, Will You...



There are big hiring plans ahead, too. Just less than half of employers we spoke to will hire more talent within six months, including permanent roles and (even more so) contractors. Staff coming in on visas is still not an immediate focus, unless there is a justification for a specific skill set that cannot be found in Australia.

## In the Coming Months Will You Hire...

Permanent Staff		Contractors		Staff on Visas	
Yes	48%	Yes	63%	Yes	15%
No	19%	No	15%	No	59%
Maybe	33%	Maybe	22%	Maybe	26%





Last year, the availability of service providers and fluctuations in oil prices were the top two biggest challenges employers claimed to be facing. This year, other problems have risen to be a greater challenge: access to capital (48%) and the gas price cap (44%). Hiring and retaining staff were also notable, coming in joint-third (37%).

#### Top Business Challenges

Access to capital	48%
Gas price cap	44%
Hiring staff/contractors	37%
Retaining staff/contractors	37%
Oil price fluctuations	26%
Availability of service providers	26%
Other	22%

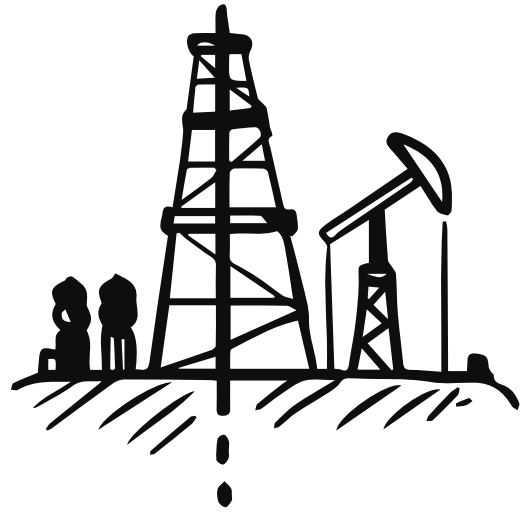
On the hiring front, the perceived limited availability of candidates is causing the most issues, cited by 52% of employers when asked about recruitment challenges.

#### Top Recruitment Challenges

Budget limitations	19%
Counter offers	4%
Limited availability of candidates	52%
None	22%
Other	4%

#### Gas Price Cap

The gas price cap was cited as a major concern for employers in the oil and gas industry, outweighing almost every other forecasted problem. The final question we asked employers, therefore, was whether or not this change would affect their plans for the coming 12 months. Nearly half (48%) said no.



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## About Us


### Oil & Gas Recruitment Solutions Delivered By Industry Professionals

Patch Personnel was formed by a group of successful recruitment professionals and Oil and Gas industry leaders to ensure the delivery of a comprehensive and high-quality range of personnel services to the Oil and Gas sector.

At Patch Personnel, we ensure the talent requirements of the client are matched with the capabilities of our candidates. Through the experience of the Patch Technical Selection Panel, we ascertain the required skills to find the best possible fit for every role.


The Panel is made up of highly experienced Oil and Gas leaders and professionals who are well-versed in the various disciplines in which we recruit. Panel members have extensive industry experience and have typically led large projects and teams, meaning they understand our clients' needs and can identify the right people for each organisation.

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 Level 12, 10 Market Street,  
Brisbane, QLD, 4000

 +61 7 3160 2626

 [patchpersonnel.com](http://patchpersonnel.com)

 [info@patchpersonnel.com](mailto:info@patchpersonnel.com)