

Sectoral Human Capital Study II (BBKL II)

Marketing Communications Sector

Survey results summary
– 1st edition

About the study



Study name

Sectoral Human Capital Study II (BBKL II)
Marketing Communications Sector (MC Sector)



Study objective

To increase the knowledge about the current and future demand for skills in the marketing communications sector



Research dates

1st edition of the survey:

February 16, 2021 – August 25, 2021

including a quantitative survey:

July 21, 2021 – August 25, 2021



Respondents

Qualitative survey:

Employers, industry experts, education and HR experts, employees and clients

Quantitative survey:

Employers and employees representing the key positions from marketing communications sector (PKD J58.1 (excluding PKD J58.11.Z), PKD J59, PKD J60, PKD M.73.1)

Research methods

- 
- In-depth interviews with employers' representatives
 - In-depth interviews with industry analysts and HR experts from the sector
 - Expert panels
 - Consultations with sector staff
 - Panel discussion with members of the Sector Competence Council for the MC sector
 - Delphi survey with industry experts
 - Quantitative survey of employers (n = 813) and employees (n = 819) from the sector



About the sector

The study's adopted definition of the sector includes:



Publishing (PKD J58.1) excluding book publishing (PKD J58.11.Z), but including online publishing



Production of films, television programmes, and recordings (with special regard to entities producing for the advertising sub-sector) (PKD J59)



Public and subscription broadcasting (PKD J60)



Advertising (PKD M.73.1)

The marketing communications sector consists of:

11,000 companies

ZUS data, as of 31.12.2020, excluding the self-employed

145,500 employees

Statistics Poland data, as of November 20, 2020

Key business processes in the sector

Advertising	Production of films, programmes and recordings	Broadcasting	Publishers and Internet publishers
» Strategy	» Design	» Design	» Design
» Creation	» Production	» Production	» Production
» Production		» Broadcasting (sales)	» Publication and supervision
» Media planning, purchasing, and broadcasting		» Sales settlement	» Monitoring
» Monitoring			

Key positions in the sector



Strategist



Analyst



Media Planner



Creative Director



Art Director



Content Creator



Graphic Designer



Digital Expert



Project Manager



Account Manager

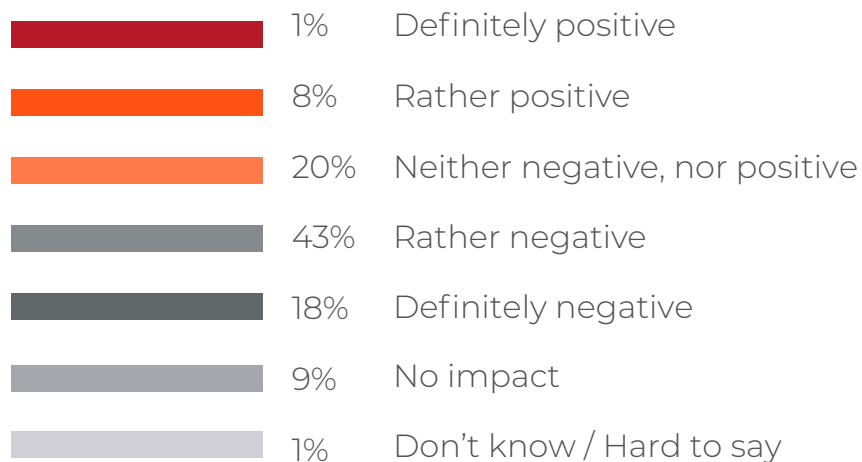
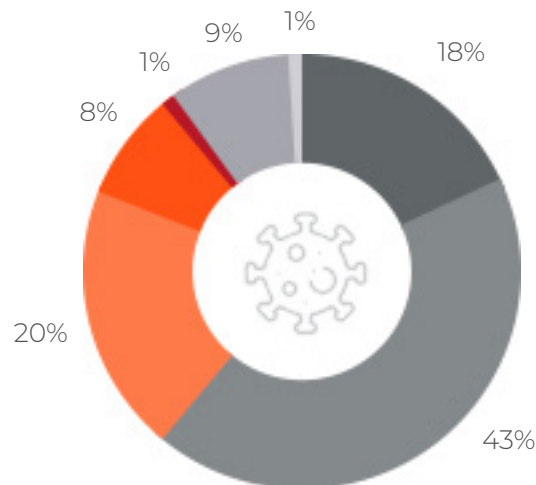


Producer

COVID-19 pandemic's impact on the sector

90% of companies from the sector experienced the consequences of the COVID-19 pandemic

- » 62% – negative
- » 9% – positive
- » 20% of employers cannot clearly assess whether the impact of the pandemic on their businesses was positive or negative



Most frequently mentioned negative effects of the pandemic

- » Reduction in the number of customers (59% of employers)
- » Significant decrease in orders (59%)
- » Problems with acquiring new customers (46%)
- » Financial liquidity imbalance (46%)
- » Customers' withdrawal from certain campaigns (39%)

Most frequently mentioned positive effects of the pandemic

- » Company maintenance costs reduction (12%)
- » Shortened supply chains (12%)
- » Expansion of the business offer (11%)
- » Starting or intensifying e-commerce activities (7%)
- » Automation of content production (6%)



Methods of coping with the pandemic

60% of companies introduced new or improved services, systems or products, most often concerning:



Work organization
(30% of companies introduced improvements)



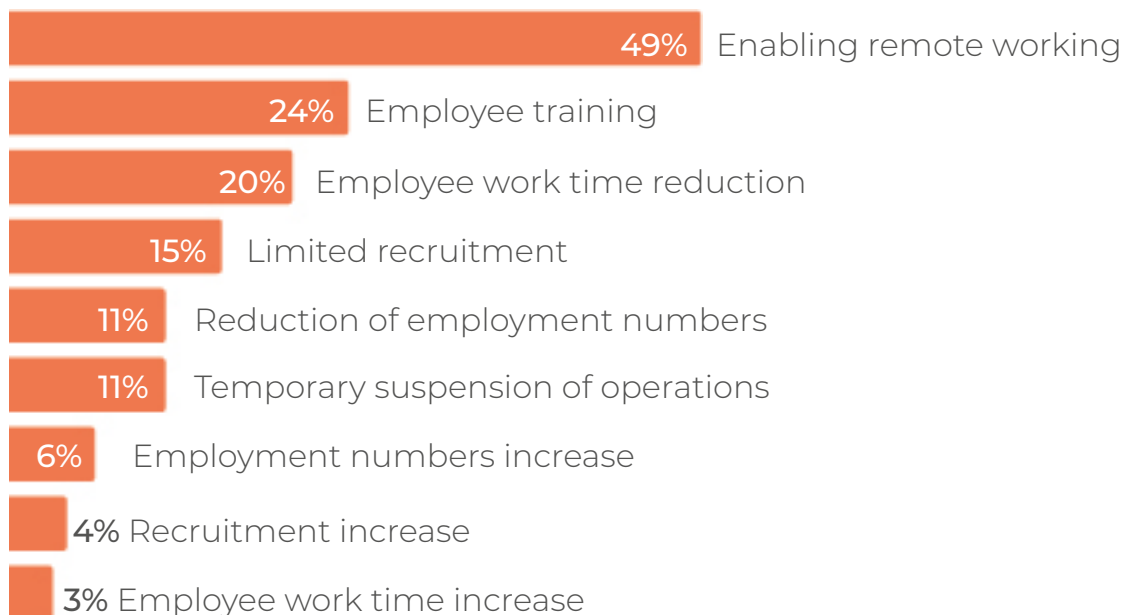
Methods of working with clients (24%)



Ways of reaching the customer (21%)

40% of companies adopted survival tactics and did not introduce new or improved solutions

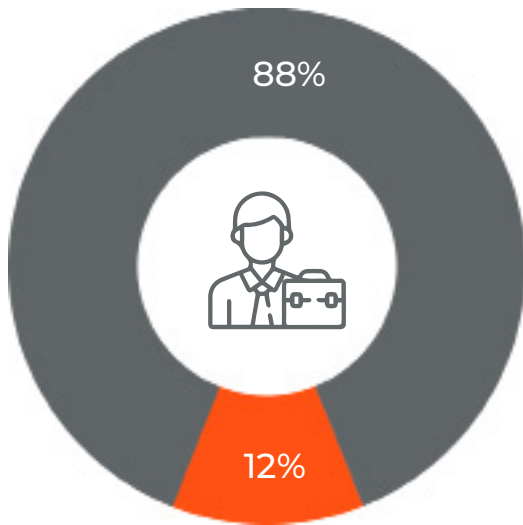
Employment solutions used by companies during the pandemic



Only **11%** of companies reduced their workforce

Demand for employees in the sector

- » 12% of companies were looking for new hires between August 2020 and August 2021
- » Half of the companies that looked for employees experienced recruitment problems



Companies looking for employees in the 12 months prior to the survey (as of August 2021)

12% were looking

88% were not looking

Source: BBKL II MC Sector, employers – 1st edition 2021 (n = 813)



Among the employers who were looking for employees in the past 12 months

50% had difficulty finding employees

50% had no difficulty finding employees

Source: BBKL II MC Sector, employers – 1st edition 2021 (n = 113). The question was answered by employers who looked for employees in the past 12 months

Most wanted employees in the sector



Graphic Designer
(33%)



Content Creator
(23%)



Sales Specialist
(9%)



Account Manager
(9%)



Digital Expert
(8%)



Media Planner
(8%)

The most frequent difficulty in finding a suitable employee was connected with the mismatch of candidates' skills and employers' expectations. The problem affected over a half of the companies that had problems finding employees and was more common in the case of medium and large companies.

Source: BBKL II MC Sector, employers – 1st edition 2021 (n = 58)

Skills in the sector

93% of employers believe that there is no need to improve employees' skills

4% only few employers declared that the skills of their employees need to be developed in certain areas

According to experts, the sector primarily experiences the shortage of social skills related to managerial competence (in the area of communication and management) and selected specialist skills.

Source: BBKL II MC Sector – 1st edition 2021, employers (n = 813) and qualitative research

Balance of competences (skills)

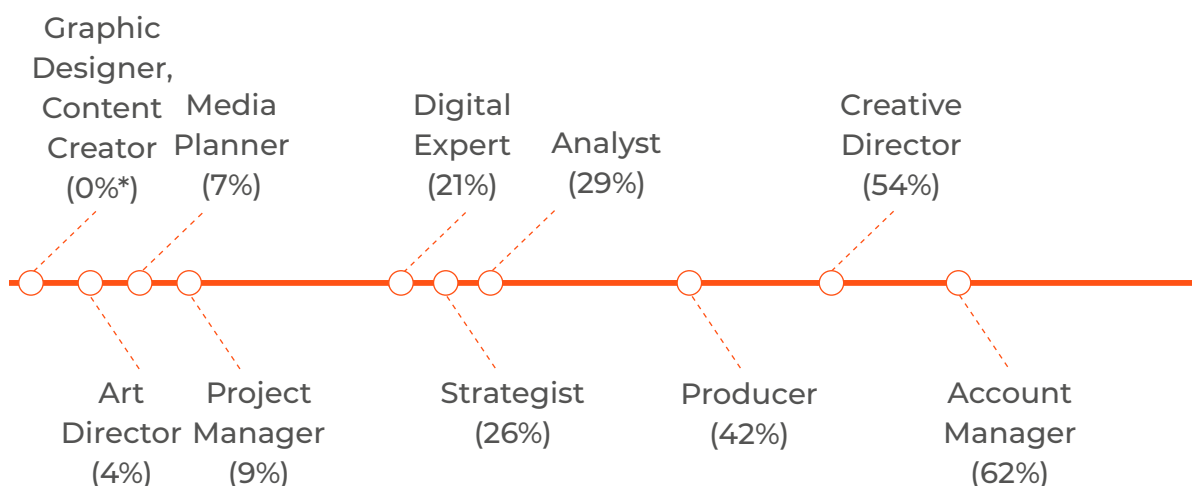
Research aims:

- » To assess skills' mismatch
- » To identify the competence gap
- » To assess the importance of skills in the future

Competence gap – skills that are relatively more important for employers while being more difficult to obtain according to over 50% of employers evaluating a given competence profile

The biggest competence gap is found in the case of account managers, creative directors, and producers. This means that, in comparison to the other positions analyzed, these positions involve the biggest number of skills that are more important while being difficult to find on the market.

There is no competence gap in the case of graphic designers and content creators, which means that employers did not mention any skills involved in these positions that are relatively more important while being difficult to obtain from the market.



* Percentage of skills that are relatively more important for employers while being more difficult to obtain of all the skills from a given position's profile.

Trends in the sector

Increasing importance of H2H (Human to Human) communication, especially 3E communication, which consists of empathy, engagement and education

Increasing importance of online presence at the expense of traditional media

Progressing structural merger processes in entities operating in the sector

Changing methods of campaign and employee effectiveness calculation

Increasing emphasis on interactivity of communication and the struggle to engage customers

Increasing importance of ethical issues and CSR

Content algorithmization



Challenges faced by employers

Establishing and maintaining relationships with freelancers, building a sense of ownership and responsibility for the company's operations with them



Developing ways to control and measure the effectiveness of advertising campaigns in traditional media



Keeping communication audiences engaged, including increasing their interactivity



Flexible management of teams working in different systems (online, hybrid, on-site)



Media and content digitization, including the creation of platforms with paid content



Longer employee retention



Developing tools to support and automate the processes of collecting, storing, and processing data, including analysis and inference (e.g. customer purchase preference data)



Creating and managing interdisciplinary teams (consisting of people with knowledge from different fields and with different skills), within specific projects



Ensuring content quality and credibility



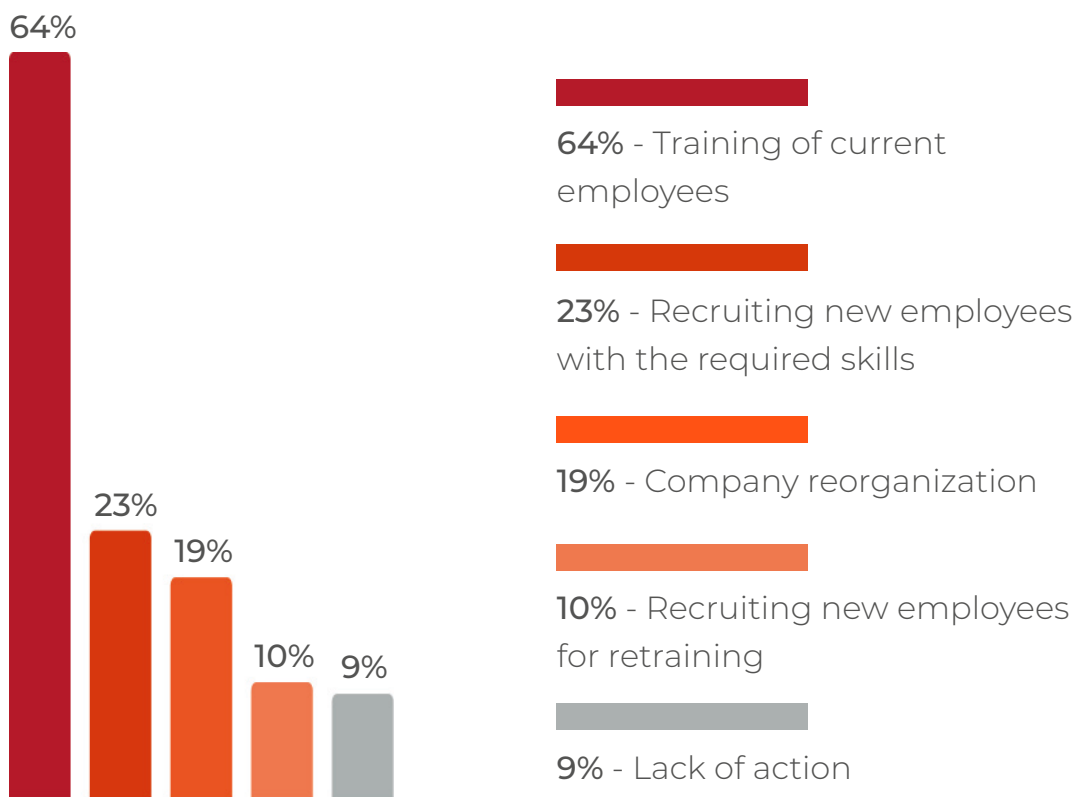
Best ways to motivate employees



Less experienced employees (up to 4 years of work) consider **flexible working hours (74%)**, the **ability to work remotely (72%)**, and **work-life balance (65%)** as most important. In the case of those more senior (10 or more years), besides the possibility of remote work (50%), consideration should be given to a **well-organized workplace (50%)**.


Actions taken when employees lack skills

When the lack of specific skills is identified, most employers (64%) take **steps to retrain their employees**. Only 9% of all employers – most commonly micro companies (10%) – do not implement any corrective actions when their employees lack skills.



Most effective trainings use mixed methods i.e. both traditional meetings and elements of e-learning.

Possible directions of sector development



Further structural changes in companies, such as consolidations, creation of „in house” structures, and creation of independent freelance teams

As a result of customers and employees' growing awareness, success criteria of companies operating in the sector will be reevaluated – activities consistent with ethics, sustainable development and corporate social responsibility will become as important as financial results

Development of communication form and content will be dictated by progressing automation of marketing processes and the growing importance of Human to Human (H2H) communication, which focuses primarily on building a relationship with the recipient of the message

Dynamic popularity growth of marketing communication delivered via online channels, observed during the pandemic

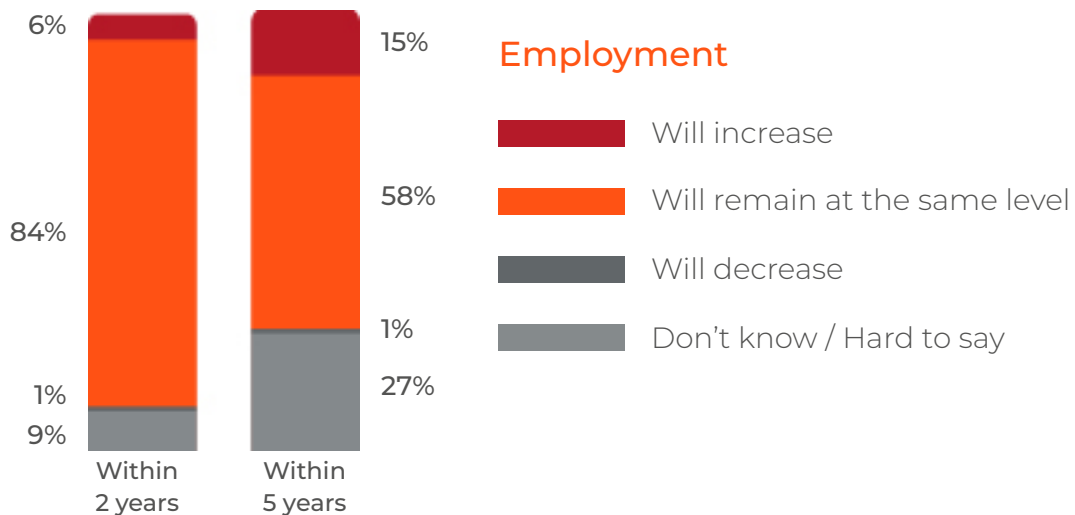
Employment forecasts for the sector

Next 12 months

- » 95% of employees in key positions do not intend to change jobs
- » 93% of employers plan to maintain the headcount

Next 2 and 5 years

- » 84% of employers believe that employment in the CM sector will not change in the next two years, but in a longer perspective (5 years) the same share is going to drop to 58%
- » 6% of employers expect an increase in employment within two years and 15% within five



Over the next 5 years, there **will be increased demand for employees** in positions related to the following areas:



IT



Strategy



Data analysis

Skills of the future

According to most of the surveyed employers, the importance of skills for each of the key positions will remain the same what means that they will continue to be important. However, between 20% and 40% of employers expect an increase in importance for each of the key skills.

Among the skills that will increase in importance, certain areas can be identified:



Effective communication (including negotiation and brand trust-building skills)



Analytical skills (including trend analysis)



Specialized skills such as operating specific tools and processes



Acting in accordance with ethical principles



Creativity



Ability to identify customers' needs



Openness to change



Ability to think strategically and explain complex issues to a wider audience



Team management and employee motivation (leadership skills)

Development scenarios

Two factors will influence the future direction of the companies development: content algorithmization and the importance of H2H communication (especially the quality of communication). Depending on which factor employers emphasize, they will implement one of the following scenarios in their companies:

Marketing 5.0

Companies from the sector are eager to use the latest tools and technological solutions while maintaining the best possible customer relationships

Template marketing

Companies operating in the sector are eager to use the latest tools and technological solutions at the expense of the quality of the established and maintained relationships with customers (focusing on quantity rather than quality)

Personal marketing

Companies operating in the sector are not eager to use the latest tools and technological solutions; however, they provide highest quality services, prioritizing customer relationships (focusing on quality rather than quantity)

Old-school marketing

Companies operating in the sector are not eager to use the latest tools and technological solutions, nor do they place much importance on establishing and maintaining in-depth relationships with customers



Full survey results are discussed
in the study:

Sectoral Human Capital Study II. Marketing Communications Sector

Report from the first edition of the
survey



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