

## Sectoral Human Capital Study II

# Marketing Communications Sector

A selection of results from the  
2<sup>nd</sup> edition

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## About the study

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### Study name

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Sectoral Human Capital Study II (SHCS II)  
Marketing Communications Sector (2<sup>nd</sup> edition)



### Study objective

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To increase awareness of current and future demand for skills in the marketing communications sector



### Research dates\*

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April 2022 to June 2023



### Respondents

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**Qualitative survey:**

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

**Quantitative survey:**

Employers and employees representing key positions in the marketing communications sector (NACE J58.1 (excluding NACE J58.1.1.Z), NACE J59, NACE J60, NACE M.73.1)

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\* The 1<sup>st</sup> edition was carried out from February 2021 to August 2021. The report from the 1<sup>st</sup> edition of the study is available on the PARP website.

## Research methods



Expert panels  
(3x 10 people each)



In-depth interviews  
with employers and  
experts  
(n=20)



Summary panel  
with SCC MC\*  
members  
(n=7)



Delphi survey with  
industry experts  
(2 iterations of  
40 people each)



Quantitative  
survey of employers  
(n=804) and  
employees (n=806)



Futurology  
workshop  
(2x 5 people each)

## About the sector

The study takes the following definition of the industry:



Publishing (NACE J58.1) excluding books (NACE J58.1.1.Z), but including online publishing



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



Public and subscription broadcasting (NACE J60)



Advertising (NACE M.73.1)

The marketing communications industry is:

**11 000** companies

Estimate based on ZUS data (as of 30.06.2022, excluding the self-employed) and GUS data (as of 31.12.2021)

**151 000** employees

Estimate based on GUS data (as at 31.12.2021)

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## Sector “boom” in 2021

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2021 proved to be a surprisingly successful year in the marketing communications sector. It was a time of partial stabilisation – companies had become accustomed to the pandemic, and the war in Ukraine had not yet begun. Some even spoke of a sector “boom”.

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*“The previous year went surprisingly well, both in terms of business and image. (...) When I look at the market, it seems to me that we all came out of the pandemic with a good hand. Perhaps even better than we thought. In terms of business or marketing, it turned out that the world was able to handle it after all, and that Poland was able to handle it.”*

Industry expert, representative of employers in the publishing sub-sector. Individual interview

The generally good situation in the sector is confirmed by employers' declarations of recorded profits.

Compared to 2020, the proportion of companies that registered a profit increased by 21 percentage points.

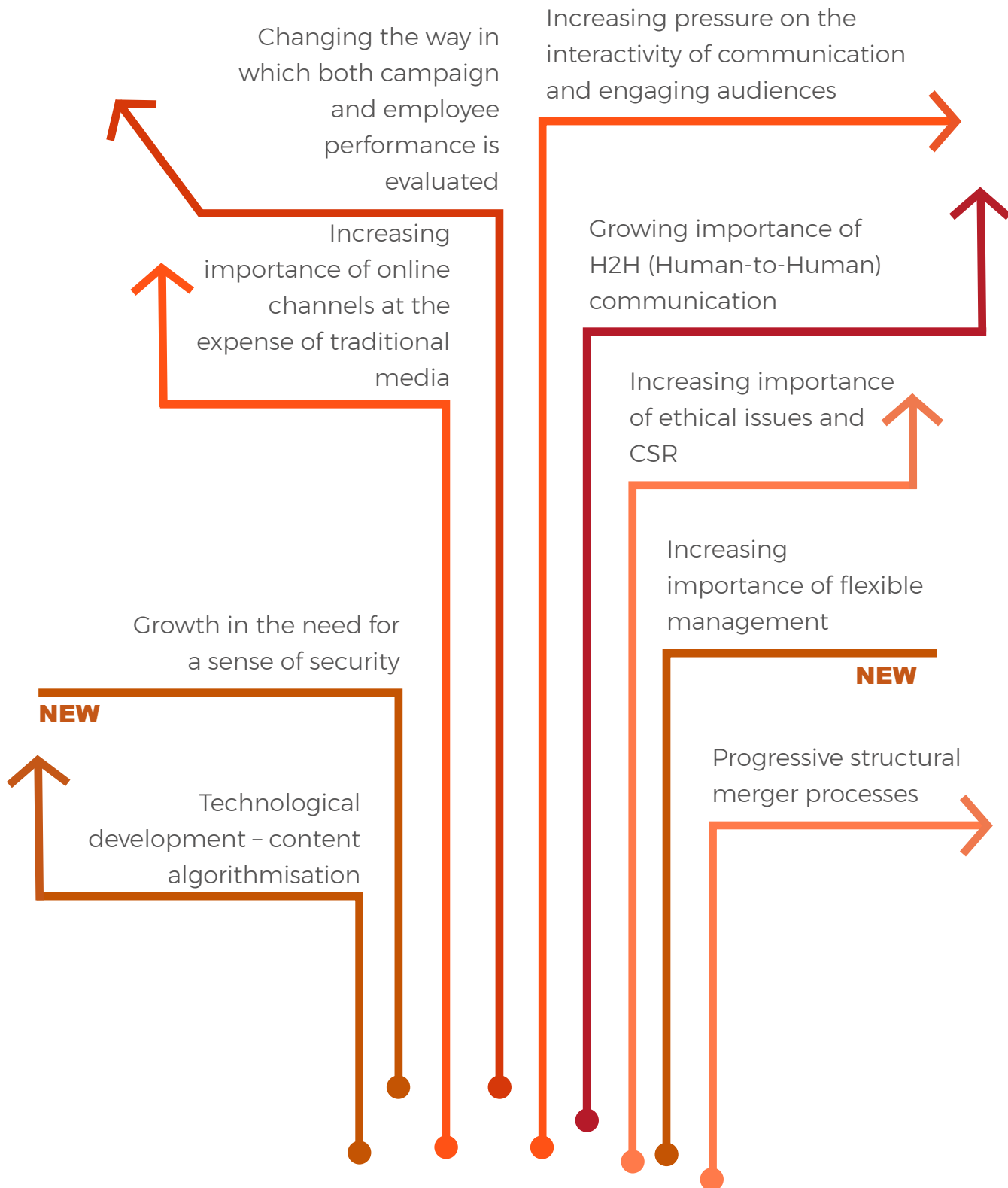
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**83%** of companies in the sector recorded a profit

**8%** of companies in the sector recorded a loss

**9%** of employers did not give a clear answer

## Trends in the sector\*



\* The arrows next to each trend indicate that a change (increase in importance - upward arrows) or lack of change (horizontal arrows) is observed with respect to the 1<sup>st</sup> edition.

Source: Own study based on SHCS II MC, employers - 2<sup>nd</sup> edition 2023 (n = 804).

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## The impact of the pandemic and the war in Ukraine on companies operating in the sector\*

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### Selected negative changes

- » Financial liquidity problems (36%)
- » Decrease in the number of clients (32%)
- » Significant drop in orders (30%)
- » Problems securing regular customers (26%)
- » Clients making budget cuts (25%)

### Selected positive changes

- » Introduction of remote or hybrid work (28%)
- » Acquisition of new customers and business partners (21%)
- » Offering a broader range of products and services (21%)
- » Reduction in company running costs (18%)
- » Automation of content production (13%)

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\* Percentage of employers indications in brackets.

Source: Own study based on SHCS II MC, employers – 2<sup>nd</sup> edition 2023 (n = 804).



## Challenges for companies

|            |  |
|------------|--|
| <b>58%</b> | Maintaining liquidity  |
| <b>56%</b> | Meeting workers' pay pressures   |
| <b>48%</b> | Ensuring the integrity and credibility of the message  |
| <b>45%</b> | Bonding the employee to the company in the long term   |
| <b>44%</b> | Creating platforms where paid content is posted  |
| <b>43%</b> | Developing and implementing effective ways to control and measure the effectiveness of advertising campaigns in traditional media          |
| <b>42%</b> | Conducting operations in line with business ethics and sustainable development principles  |
| <b>42%</b> | Flexible management of dispersed teams working on different systems  |
| <b>41%</b> | Developing tools to support and automate the processes of data collection, storage and processing, through to their analysis and inference |
| <b>40%</b> | Keeping the recipients of communication engaged, including through increasing interactivity  |
| <b>38%</b> | Creating and managing teams within specific projects that include freelancers  |
| <b>35%</b> | Networking with influencers  |



# “Marketing communication 2030”

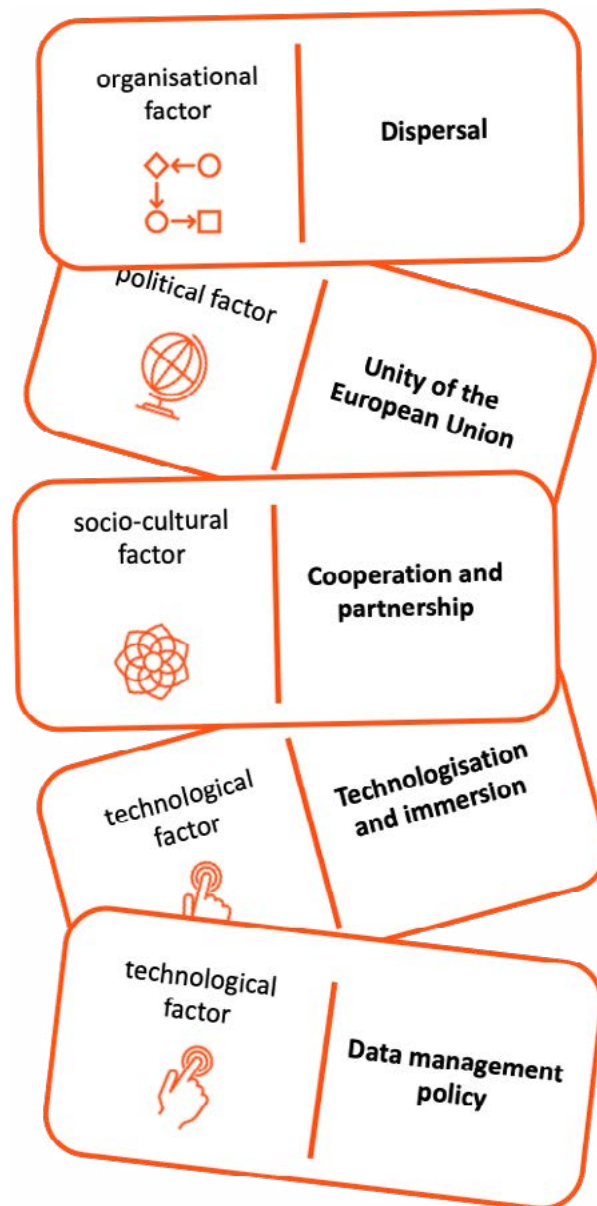
## – development scenarios

The future of the sector is influenced by many different factors, which are the result of the sector’s current situation and trends. By comparing factors that experts believe to be of the greatest importance for the future of the sector, and which at the same time are the most unpredictable, **three scenarios of the development of the “Marketing Communications 2030” sector were drawn up.**

## SLOW CRAFT MARKETING

How do companies in the marketing communication sector operate in this reality?

As expected, after relative stability, the sector **related to digital marketing and the promoting of local products and brands is developing.** Traditional media are managing relatively well. Due to the growing need for stability and security, **lasting relationships between employees and employers are being established** more frequently, which meets the expectations of both parties. The establishment of **multifaceted networks** between companies in the sector and their customers, educational institutions and representatives of local communities is steadily gaining importance.



## What opportunities does the SLOW CRAFT MARKETING scenario present for companies in the sector?



- » Stability and the resulting ability to gradually achieve objectives
- » Networking within communities, fostering new local customers
- » Strengthening position of the marketing communications sector in the economy
- » Opportunities for start-ups and companies to develop beyond agglomerations – the emergence of local agencies specialising in creating messages for local audiences

## What challenges do companies in the sector face in this scenario?

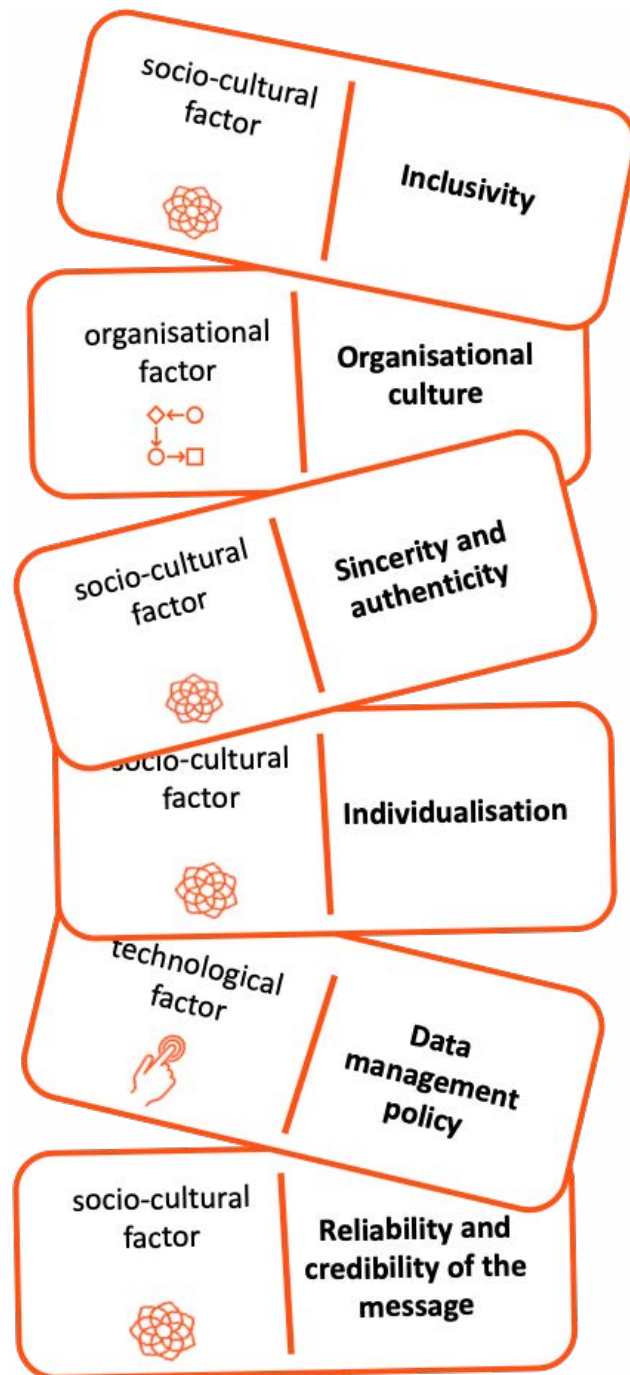


- » Finding new ways to reach specific audiences within local communities
- » Creating new tools to compete with the solutions of technology giants
- » Attracting talent from the outside, in collaboration with local government, cultural and entertainment institutions and the business community

# SOFT HUMAN MARKETING

How do companies in the marketing communications sector operate in this reality?

Due to privacy restrictions, **reaching media users with a personalised offer is very difficult**. In order to attract young workers to the sector during the demographic crisis, employers are starting to redefine their success criteria - **acting ethically, promoting "good" brands and products** are no longer just empty slogans. Adopting a democratic, **participative management model** is becoming standard. Companies are characterised by an overwhelmingly horizontal organisational structure. Employees primarily play a **supervisory and monitoring** role in **relation to artificial intelligence products**. Creative departments are definitely expanding in companies.



## What opportunities does the SOFT HUMAN MARKETING scenario present for companies in the sector?



- » Improving the image of the marketing communications sector
- » Finding effective solutions to integrate silvers into the employment structures of companies
- » Replacing the simplest actions with artificial intelligence – relieving employees of repetitive tasks
- » The role of companies in the sector is changing, and is not limited to just communication – companies are becoming their customers' partners, their business advisors

## What challenges do companies in the sector face in this scenario?

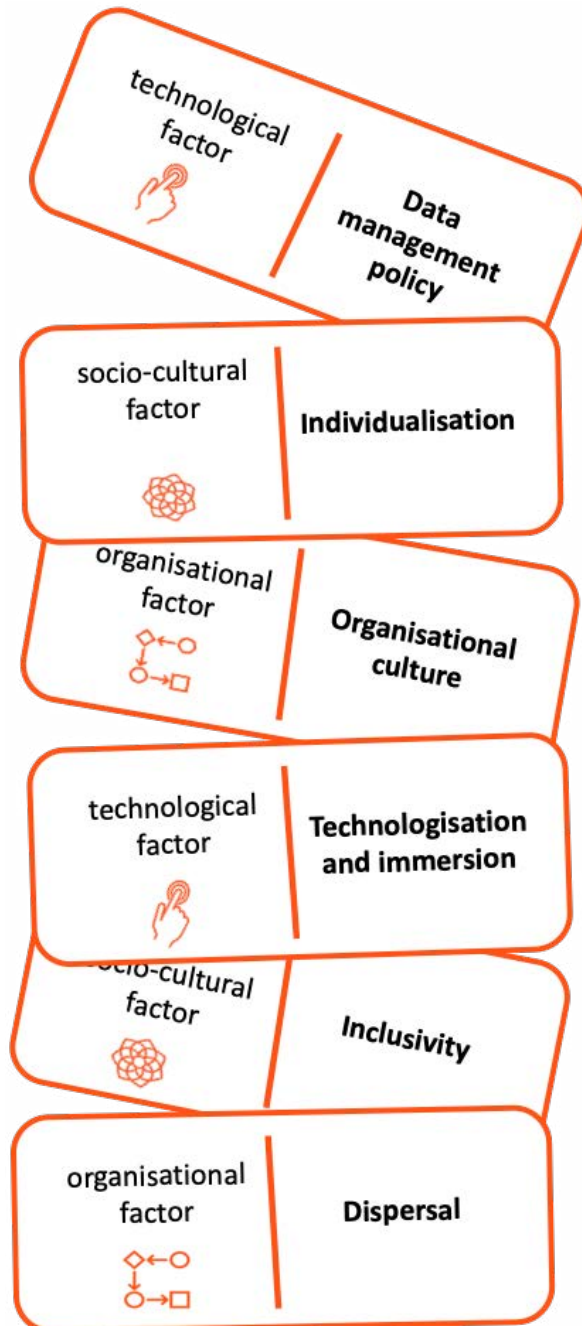


- » Striking a balance between business objectives and ethical and sustainable measures
- » Educating employees and customers on the long-term benefits of ethical and sustainable operations
- » Facing higher costs of running a business
- » Implementing solutions to meet the needs of both older and younger employees, as well as a growing number of employees from different cultural backgrounds

# TURBO TECH MARKETING

How do companies in the marketing communications sector operate in this reality?

The technologisation and automation of many processes and the shortened working week saves people time, which they are happy to use to consume a variety of content. People are getting richer, but they are also increasingly aware of the dangers of the mindless purchase of goods and services. However, these rules do not apply in the virtual world, so many **purchasing habits are transferred to the metaverse**. In the marketing communications sector, most companies have integrated technology into all types of services provided.



## What opportunities does the TURBO TECH MARKETING scenario present for companies in the sector?



- » The ability to deliver a personalised message to addressees
- » People employed by companies are relieved of simple repetitive tasks
- » Opportunity for rapid growth and expansion into other markets

## What challenges do companies in the sector face in this scenario?



- » Exploring the unique functioning of the metaverse and finding their own solutions in this area
- » Acquiring talent in new technologies
- » Investing in tools that can be used in the metaverse
- » Meeting the pressures of digital transformation in traditional media

# Key business processes

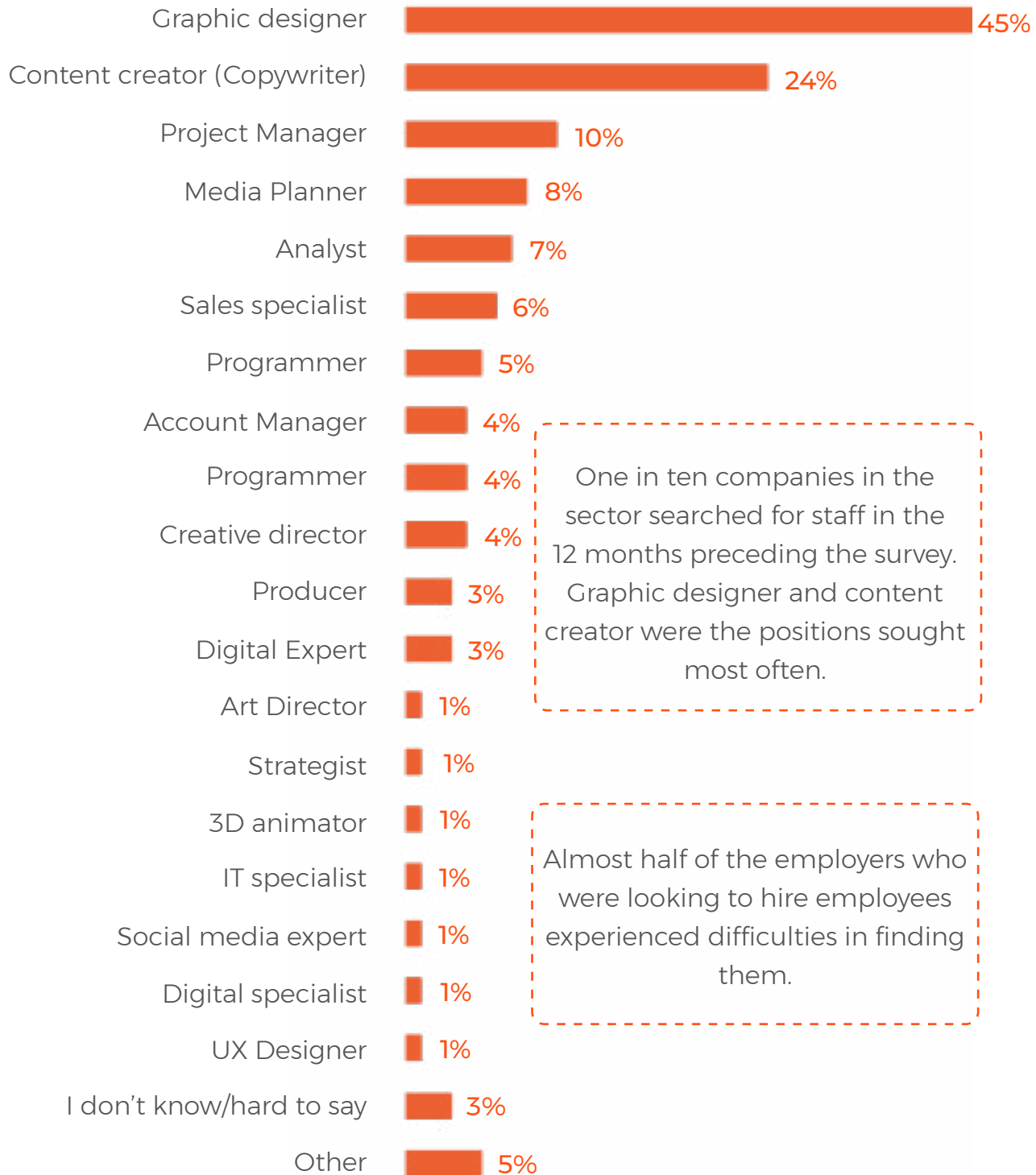
| Advertising                                 | Production of films, programmes and recordings | Broadcasting           | Print and online publishers   |
|---|--|------------------------|-------------------------------|
| » Strategy                                  | » Design                                       | » Design               | » Design                      |
| » Creation                                  | » Production                                   | » Production           | » Production                  |
| » Production                                |  | » Broadcasting (sales) | » Publication and supervision |
| » Media planning, purchase and broadcasting |  | » Sales settlement     | » Monitoring                  |
| » Monitoring                                |  |                        |                               |

# Key positions in the industry



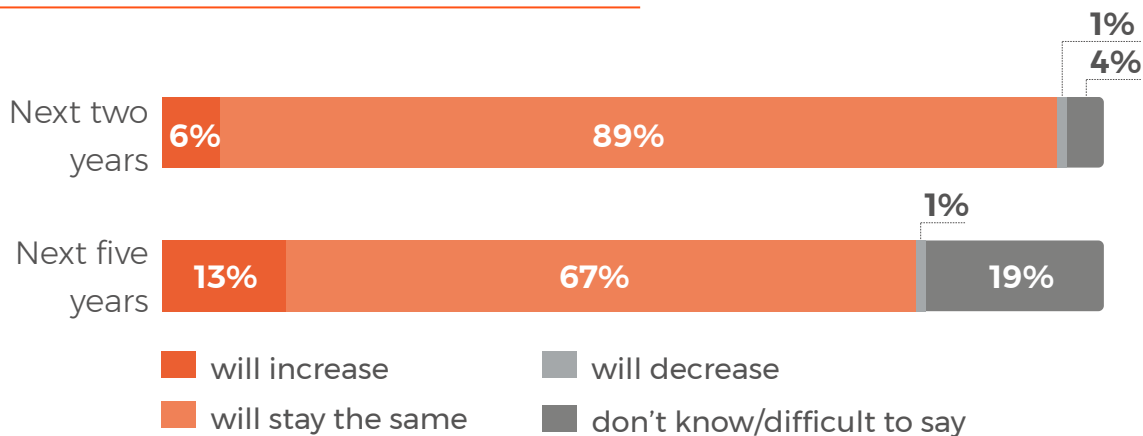
Most companies employ graphic designers (63%) and content creators (47%).

# Job demand among employers looking to hire





# Changes expected in the level of employment in the next two and five years



**6%**

of employers are planning to hire new people in the next two years

**13%**

of employers are planning to hire new people in the next five years

Employers anticipate job growth in the areas of communication, IT and data analytics as well as in positions related to automation and new technologies.



Communication area



IT



Data analysis



Automation and new technologies

## New positions in the sector

# 95%

of employers are of the opinion that no new positions will appear in their companies in the next five years

Source: Own study based on SHCS II Marketing Communication, employers – 2<sup>nd</sup> edition 2023 (n = 804).

However, industry experts pointed to **new positions** that will emerge in the sector.

In the group of **new jobs in the area of technology**, one should mention positions related to:

- » creating podcasts
- » creative supervision of automated content generation systems
- » “care” of robots
- » the digital economy: crypto, Web3, metaverse, the NFT market and game-advertising

Among **other new positions** (less linked to technological development) the following were mentioned:

- » technology translator – between teams and the clients
- » a specialist in the area of mental healthcare for employees
- » marketing ethics specialist and cultural assistant

# NEW POSITIONS

# NFT

# Game-ad

# Metaversum

NFT Translator  
Specialist in NFT long-term  
value estimation  
NFT Expert  
NFT Consultant  
NFT Strategist  
NFT Analyst

Game Designer  
Gaming Strategist  
Game-ad Ads Handler  
Game-ad Expert  
Gamers' Behaviour Analyst

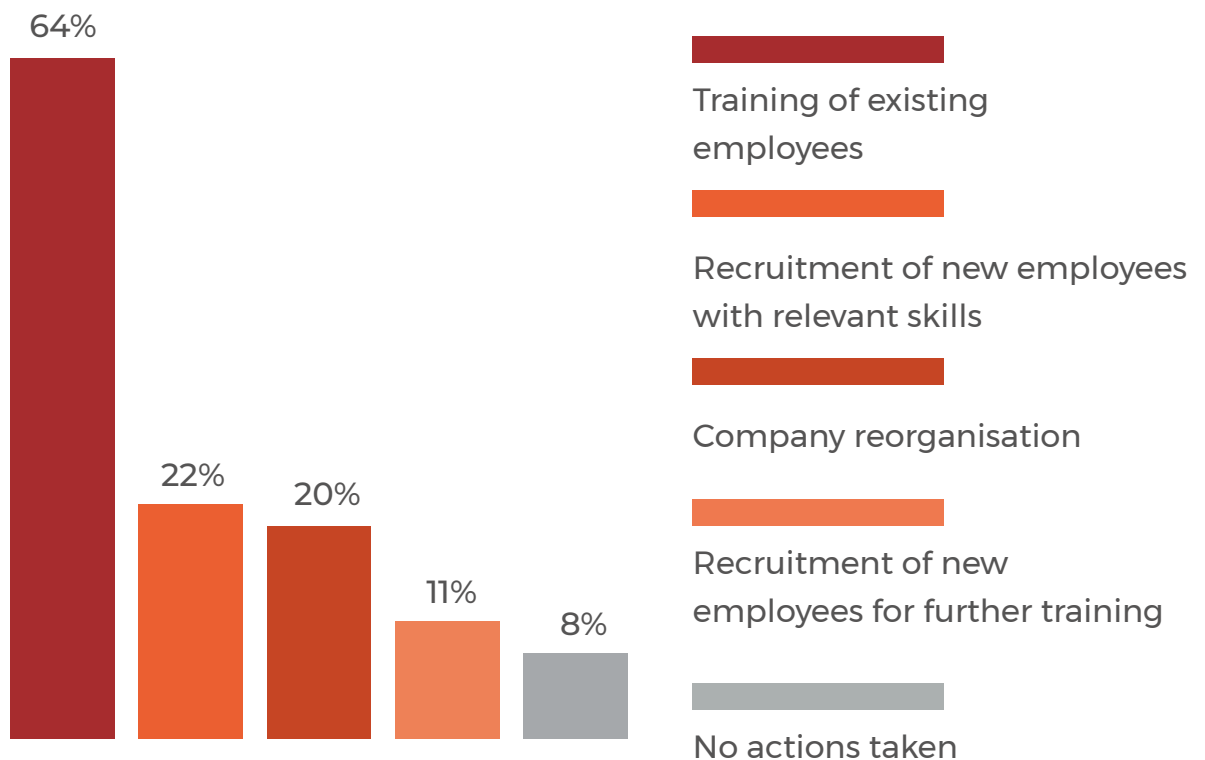
Metaverse Developer  
Metaverse relations-building Expert  
Metaverse Analyst  
Metaverse UX Specialist  
Metaverse Ads Handler  
Metaverse Expert  
Metaverse Designer  
Metaverse Writer  
Metaverse Strategy Planner  
Metaverse Communication Manager  
Metaverse Spatial Organiser

## Assessing staff competencies

**48%** of employers do not assess what competencies their employees need

**35%** of employees do not feel evaluated on their competencies

## Steps taken when employees lack competencies



Micro-firms invest in employee development almost as often as other companies when competency gaps are identified in employees.

Three out of four companies provide employees with a minimum of one form of development.

## Competency development from an employee perspective

**63%**

of employees developed their competencies in the workplace in the 12 months prior to the survey

**94%**

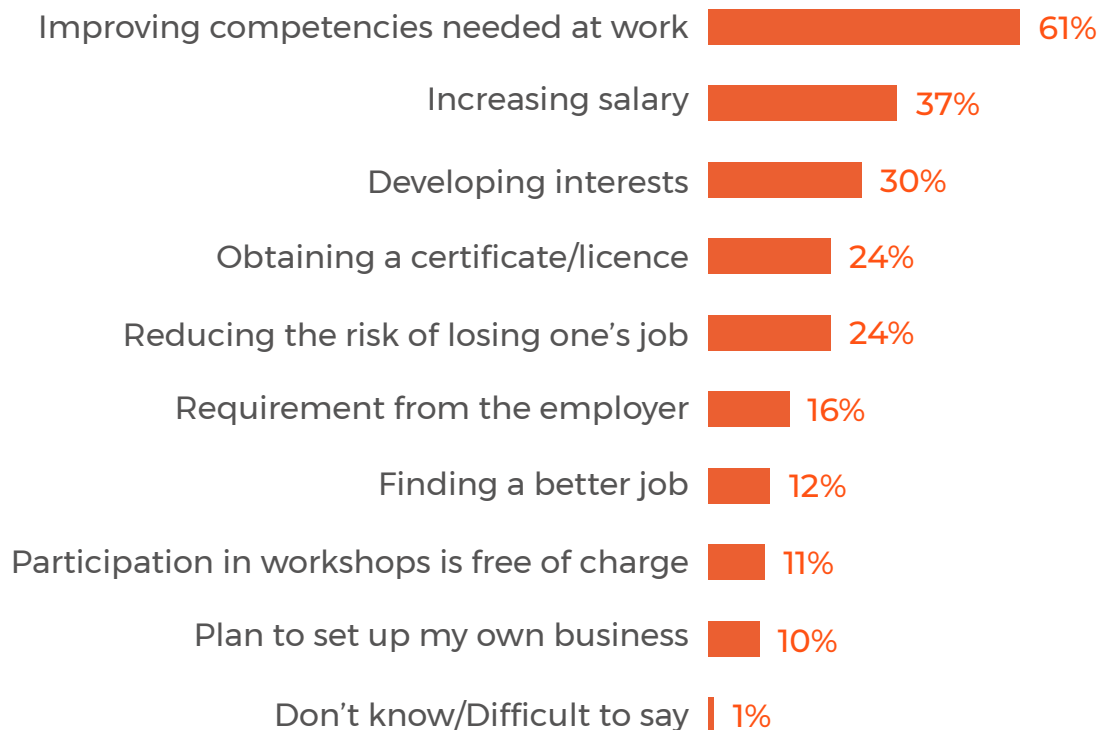
of employees claim that the measures taken in their companies to develop staff competencies are sufficient

**43%**

of employees plan to develop their competencies in the next 12 months (starting from February 2023)

Source: Own study based on SHCS II Marketing Communication, employees (n = 806) – 2<sup>nd</sup> edition 2023.

## Reasons for participating in different forms of training



Source: Own study based on SHCS II MC, employers planning for development activities in 2023 – 2<sup>nd</sup> edition 2023 (n = 344). Results do not add up to 100% – respondents could indicate more than one answer.

## Balance of competencies

The balance evaluated the key competencies for each position from the perspective of employers and employees. A comparison of these assessments should help **balance the marketing communications labour market** in terms of the supply of employees with the right competencies and employers' demand for them.

Employers in the quantitative survey referred to competencies in terms of:

- » **validity** of competencies
- » **the difficulty of finding a person** who has the specific competency needed for the job
- » forecasts of **changes in the importance** of this competency over the next five years

In addition, among the competencies whose importance will increase over the next five years, those whose importance is **already growing rapidly or will grow fastest** in the next two years, the so-called hot skills, have been identified.

Employees in the quantitative survey, on the other hand, assessed **their own level of competencies** assigned to their position **and their willingness to develop them**.

## BALANCE OF COMPETENCIES STRATEGIST



TOP 3 hard-to-find competencies that will grow in importance over the next 5 years:

- » knowledge of challenges and trends in marketing communications and key factors influencing customer/consumer purchasing decisions
- » knowledge of methodologies and techniques that support creative thinking and the search for new ideas
- » the ability to supervise, review and report on the status of the implementation of communication strategy in terms of emerging opportunities and threats and the channels used

Hot skill:

- » the ability to advise clients on choosing and changing their marketing strategy and selecting appropriate marketing communication mechanisms and channels

Employees in this position would like to improve their competencies primarily in the area of:

- » client collaboration skills – leading sessions, strategy briefs and inspiration workshops with the client’s team

**6%**

of employers hiring strategists **anticipate an increase in hiring** for this position over the next 5 years

**48%**

of employees in this position **would like to develop their skills** in the next 12 months

## BALANCE OF COMPETENCIES CONTENT CREATOR



A hard-to-find competency that will grow in importance over the next 5 years:

- » knowledge of the nature of native advertising, the principles of legal labelling of advertising, and good practices in creating native content

Hot skills:

- » none

Employees in this position would like to improve their competencies primarily in the area of:

- » cooperative skills, including the ability to display an assertive attitude
- » creating valuable and engaging content

**16%**

of employers hiring content creators **anticipate an increase in hiring** for this position over the next 5 years

**36%**

of employees in this position **would like to develop their skills** in the next 12 months



## BALANCE OF COMPETENCIES GRAPHIC DESIGNER



TOP 3 hard-to-find  
competencies  
that will grow in  
importance over  
the next 5 years:

- » knowledge of trends and requirements for the design of graphic elements using graphics creation software
- » knowledge of print and digital production requirements
- » the ability to design coherent visual identities, and to carry out multimedia projects

Hot skills:

- » none

Employees in this  
position would like  
to improve their  
competencies  
primarily in the  
area of:

- » knowledge of the tools used by graphic designers
- » collaboration with content creators

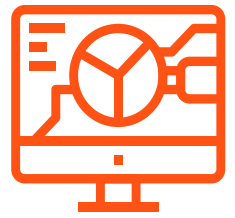
**18%**

of employers hiring graphic designers **anticipate an increase in hiring** for this position over the next 5 years

**42%**

of employees in this position **would like to develop their skills** in the next 12 months

## BALANCE OF COMPETENCIES ANALYST



TOP 3 hard-to-find  
competencies  
that will grow in  
importance over  
the next 5 years:

- » the ability to explore data and infer consumer preferences and trends
- » the ability to analyse the needs of the business environment
- » the ability to use analytical tools

TOP 3  
Hot skills:

- » the ability to analyse and draw conclusions
- » the ability to explore data and infer consumer preferences and trends
- » knowledge of the principles of ethical conduct, self-regulation and data protection

Employees in this  
position would like  
to improve their  
competencies  
primarily in the  
area of:

- » analytical skills (tool and content work with data, analysis of the business environment)
- » communication skills (in meetings with clients requiring clarification of more complex analytical issues)

**14%**

of employers hiring analysts **anticipate an increase in hiring** for his position over the next 5 years

**43%**

of employees in this position **would like to develop their skills** in the next 12 months

## BALANCE OF COMPETENCIES DIGITAL EXPERT



TOP 3 hard-to-find competencies that will grow in importance over the next 5 years:

- » knowledge of how to improve e-commerce tools and product presentation in online channels
- » knowledge of ethical conduct and data protection regulations
- » knowledge of the general functioning of the industry, the product category and related trends

Hot skills:

- » knowledge of ethical conduct and data protection regulations
- » the ability to translate marketing objectives into media KPIs
- » the ability to coordinate with in-house teams, and establish and maintain cooperation with external teams

Employees in this position would like to improve their competencies primarily in the area of:

- » knowledge of concepts and techniques that impact consumers (usability, influencer marketing, content marketing)
- » customer journey where digital and non-digital meet

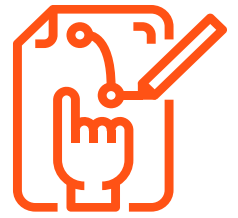
**9%**

of employers hiring digital experts **anticipate an increase in hiring** for his position over the next 5 years

**53%**

of employees in this position **would like to develop their skills** in the next 12 months

## BALANCE OF COMPETENCIES MEDIA PLANNER



A hard-to-find competency that will grow in importance over the next 5 years:

- » knowledge of the concept of dividing channels into earned, owned and paid, as well as shared media

Hot skills:

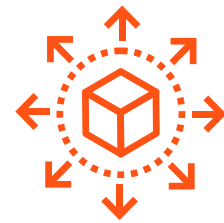
- » knowledge of concepts and techniques that support consumer influence
- » knowledge of trends and tendencies in the use of digital media
- » the ability to optimise campaign emissions in real time and modify campaign parameters on an ongoing basis in relation to the target and the media budget

Employees in this position would like to improve their competence in almost every area.

**10%** of employers hiring media planners **anticipate an increase in hiring** for this position over the next 5 years

**55%** of employees in this position **would like to develop their skills** in the next 12 months

## BALANCE OF COMPETENCIES PROJECT MANAGER



TOP 3 hard-to-find  
competencies  
that will grow in  
importance over  
the next 5 years:

- » knowledge of methodologies and techniques that support creative thinking and the search for new ideas
- » the ability to manage a project team
- » knowledge of good project management practices and methodologies, and tools to improve project communication

Hot skills:

- » knowledge of methodologies and techniques that support creative thinking and the search for new ideas
- » the ability to manage a project team

Employees in this  
position would like  
to improve their  
competencies  
primarily in the  
area of:

- » team and project management

**11%**

of employers hiring project managers **anticipate an increase in hiring** for his position over the next 5 years

**42%**

of employees in this position **would like to develop their skills** in the next 12 months

## BALANCE OF COMPETENCIES CREATIVE DIRECTOR



Hard-to-find competencies that will grow in importance over the next 5 years:

- » knowledge of methodologies and techniques that support creative thinking and the search for new ideas
- » the ability to manage teams of subordinates and project teams

Hot skill:

- » the ability to manage a creative team, allocate resources and decide on the choice of tools to be used at all stages of creation

Employees in this position, would like to improve their competencies primarily in the area of:

- » communication and cooperation
- » team leadership
- » strategic and creative thinking

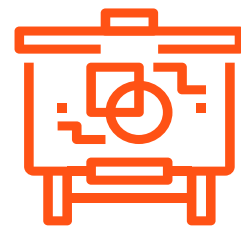
**5%**

of employers hiring creative directors **anticipate an increase in hiring** for his position over the next 5 years

**39%**

of employees in this position **would like to develop their skills** in the next 12 months

## BALANCE OF COMPETENCIES ART DIRECTOR



TOP 3 hard-to-find  
competencies  
that will grow in  
importance over  
the next 5 years:

- » knowledge of current trends in communication and social media campaigns
- » cognitive flexibility
- » knowledge of the rules behind creating Key Visuals, SoMe concepts, digital content, animations and graphic materials for advertising campaigns

Hot skills:

- » the ability to manage a creative team, inspire, train, allocate resources and coordinate with all agency departments and external service providers
- » knowledge of current trends in communication and social media campaigns
- » knowledge of the rules behind creating Key Visuals, SoMe concepts, digital content, animations and graphic materials for advertising campaigns

Employees in this position would like to improve their competence in almost every area.

**8%**

of employers hiring art directors **anticipate an increase in hiring** for his position over the next 5 years

**35%**

of employees in this position **would like to develop their skills** in the next 12 months

## BALANCE OF COMPETENCIES ACCOUNT MANAGER



Hard-to-find  
competencies  
that will grow in  
importance over  
the next 5 years:

- » the ability to work together to come up with the best options
- » the pursuit of self-development through creating and taking opportunities to acquire new knowledge and skills

Hot skill:

- » the ability to “close the sale” and provide after-sales support to the customer and ensure consistency of ongoing projects

Employees in this position would like to improve their competencies in almost every area (apart from knowledge of MS Office and knowledge of methods for analysing the effectiveness of sales activities).

**7%**

of employers hiring account managers **anticipate an increase in hiring** for this position over the next 5 years

**41%**

of employees in this position **would like to develop their skills** in the next 12 months



## BALANCE OF COMPETENCIES PRODUCER



TOP 3 hard-to-find competencies that will grow in importance over the next 5 years:

- » the ability to organise the formal, equipment-related and financial conditions of production
- » the ability to analyse quotes, negotiate with suppliers, developers and customers and establish optimum conditions for collaboration by estimating the risks
- » the ability to demonstrate mental resilience, to adapt to changing circumstances

Hot skills:

- » the ability to work with the production team
- » the ability to coordinate the production of audiovisual content for distribution in multi-channel media
- » knowledge of the role of talent and the filmmaker in the filmmaking process

Employees in this position would like to improve their competencies primarily in the area of:

- » cooperation (working with the production team, motivating others)
- » organising one's own work effectively
- » decision-making courage, i.e. acting boldly and assertively within one's competencies

**11%**

of employers hiring producers **anticipate an increase in hiring** for his position over the next 5 years

**46%**

of employees in this position **would like to develop their skills** in the next 12 months

# Competencies of the future

The competencies that are **already growing in importance or will grow in importance in the future** embrace **certain groups of skills** related to:



» **effective communication** (especially building relations with customers, partners, creators and suppliers based on partnership, professionalism and trust, as well as managing communication within a team – leadership competencies)



» **navigating digital channels** (including knowledge of the rules and tools for digital creation)



» **analytical skills** (including trend analysis)



» **knowledge of and compliance with ethical principles**

In regard to managerial positions, **an increase in the importance of leadership competencies** was indicated, especially in terms of team management and the ability to optimise costs.

**New competencies** (in relation to the 1<sup>st</sup> edition) include:



» **feeling/taking responsibility** for one's actions (in terms of acting ethically)



» **awareness of one's own competencies and knowledge of oneself in relation to others** (in the context of collaboration, but also of decisions regarding empowerment)

The full results of the survey  
are discussed in the study:

Sectoral Human Capital Study II

Marketing Communication Sector

Report on the 2<sup>nd</sup> edition of the study:  
[parp.gov.pl/bklkm2](http://parp.gov.pl/bklkm2)



A study - unique in Poland and Europe -  
monitoring the demand for competences on  
the labour market - PARP - Centre for SME  
Development