# THE UK DIGITAL AND CREATIVE SECTOR

Talent Insights Report | Q4 2017

Produced by Guidant Group in partnership with Gemini People

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There has never been a more exciting and dynamic time to be part of the digital and creative sector.

The numbers speak for themselves with the industry contributing £84 billion in 2016 to the UK economy and accounting for 1 in 11 jobs.

Innovation is rapid with marketers striving to find engaging creative solutions in a data driven world and relevant uses for VR and AI. In this period of great momentum, growth is front of mind for all, agency owners, brands and entrepreneurs; but none of this can be achieved without talent.

It is our hope that with this report we will not only showcase the amazing results of the creative community, but also lift the lid on some of the glaring talent challenges the industry faces.

From a deep skills shortage and a lack of investment in training, to the worrying statistics around diversity and inclusion, the digital and creative sector has much to address, but without question the talent to do it.

Ross Taylor, CO-CEO at Gemini People

# INTRODUCTION

The digital and creative sector is extremely broad and encompasses a diverse range of activities; from telecoms to advertising and computer programming through to broadcasting.

However, the **distinction between 'digital' and 'creative' is constantly evolving and becoming far less clear**. Most creative activities now rely on or incorporate digital technologies. In turn, creativity and design disciplines are also becoming increasingly important to digital projects.

This talent insights report will focus on the UK's digital and creative sector primarily from a marketing and advertising perspective.

"The UK is the fastest-growing major advertising market in Europe, and its most successful exporter. It's a tribute to our creativity and technical innovation."

Tim Lefroy, Chief Executive, Advertising Association

# KEY FACTS AND FIGURES

- UK creative industries generate **£9.6m** per hour and are worth **£84.1bn** per year to the UK economy (2016).
- Largely **highly-skilled**, degree-educated workforce and this results in high levels of productivity and contribution to the economy.
- Every £1 which UK businesses spend on advertising generates £6 for the broader UK economy
- UK advertising spend increased to more than **£20bn** in 2016; £900m more than 2015
- Future growth of the industry is expected to be **six times quicker** than the European average
- **35%** of the top 20 UK ad agencies' total revenue is generated by overseas business
- More than **£1bn** of advertising revenue now comes from mobile
- 2016 marked the first year that mobile internet revenue exceeded fixed-line services.
- In 2020, mobile advertising will account for 50.6% of the market

**DID YOU KNOW?**

According to the IPA, UK adults use their mobile phone 264 times a day.

For 15-29 year-olds the figure is 387 times.

And for 15 year-olds it is a staggering 420 times per day. (Allowing for 8 hours sleep, that's nearly once every two minutes!)

# EMPLOYMENT WITHIN THE DIGITAL AND CREATIVE SECTOR

**London (29%) and the South-East (18%) equate for nearly half of all jobs** in the digital and creative sector. Though research by NESTA identified nine areas outside of London which were 'hotspots' specifically for creative industry: **Bath, Brighton, Bristol, Cambridge, Guildford, Edinburgh, Manchester, Oxford and Wycombe-Slough.** Recently, areas such as Bristol are increasingly becoming known as a 'tech-hub' destinations too.

The digital and creative sector is characterised by a high proportion of micro enterprises and self-employment and this leads to the London-centric nature of the industry. There's an understandable incentive for those who are self-employed to base themselves in an area where job prospects are high.

## DIGITAL AND CREATIVE SALARY OVERVIEW

As mentioned, the digital and creative sector enjoys relatively high levels of productivity. This is in turn reflected in **above-average wages**.

Jobs within the sector are a vital part of our national, regional and local economies. The demand for these skills will continue to grow in industries across the length and breadth of the UK.

**Salaries and contractor pay rates can vary greatly between locations.** Despite being a global hub which attracts huge numbers of digital and creative professionals, demand still outweighs supply in London and this can add up to 20% to the cost of remuneration for employers. The tables on the following pages factor in the typical low pay levels across the UK as well as the higher salaries which can be commanded by in-demand workers within the capital.

Broadly speaking, the last year has seen pay increases across all sub-sectors and disciplines within the digital and creative sector. These have come through both internal progression and moving companies.

# DIGITAL AND CREATIVE RECRUITMENT CHALLENGES

The work carried out by UK's digital and creative sector directly impacts the success of the broader economy. For it to continue to prosper it is vital that it has a workforce comprised of diversely-skilled experts. However, not only must UK businesses develop, recruit and retain the necessary type of skills, the expansion of the sector means they'll continue to be required in unprecedented numbers. This presents a number of challenges to employers seeking digital and creative professionals.

## 1. Rapid technological change

Advanced IT or software skills are much more likely to be identified as lacking amongst digital and creative employees, and employers highlight the importance of workers keeping up to date with rapid advances in technology. Training is therefore a vital investment for employers to ensure their employees stay apace with the industry.

Despite this, the prevalence of training amongst digital and creative employers is slightly **below the national average**. There is therefore a need to identify how the sector can increase training provision, and particularly continuous professional development (CPD) to ensure workers' skills are updated in line with technological developments.

## 2. Skills shortages

Digital and creative employers face challenges filling vacancies, particularly for technical roles, such as programmers and web developers. Furthermore, employers increasingly seek a 'fusion' of entrepreneurial, technical and creative skills. They often find that workers with the right technical skills may lack the business or softer skills to be effective in a role.

The world Economic Forum report on the future of jobs, published in January 2016, showed that the skills expected to be increasingly in demand over the next few years is creativity, together with complex problem solving and critical thinking.

## 3. Gender diversity

A failure to attract more females to digital and creative roles means the sub-sector misses out on an important source of potential labour. Unfortunately the industry continues to **struggle to be flexible and family friendly**, and with many women continuing to take responsibility for childcare, this has an impact at mid-management level and above. Employers need to take action to drive change and to support more flexible working practices for all.

## 4. Developing the right skills

Employers are also concerned that courses may not equip graduates with the right skills, particularly because they do not keep pace with technological change or give students sufficient practical experience. At the same time, experience and learning through doing are often more valuable to employers than formal education.

# DRIVING DIVERSITY WITHIN THE DIGITAL AND CREATIVE SECTOR

## GENDER

The Institute of Practitioners in Advertising's (IPA) definition of gender balance is 40% women or more. In its diversity survey, released in January 2017, the split of men and women at all agencies rounds out to two near-perfect halves (49.5% women). However, as with so many other industries, **the more senior the roles, the fewer women found**.

The most junior roles in advertising are filled by women 56.7% of the time at media agencies and 55.4% of the time at creative agencies. This is double the percentage of women seen in CEO, chair and managing director roles.

**In the last 10 years, there has been an overall increase in the number of women in the C-suite**. According to data from the IPA census, in 2006, women made up 23.3% of positions. In 2016, this had grown to 30.2%.

Nevertheless, a 29% increase in women at C-level over the course of a decade is still progress in the right direction, albeit slowly. At this rate, the IPA's three-year target of 40% female representation in senior positions is unfortunately still at least seven years away.

In creative agencies 51% of roles were occupied by males, while 49% were occupied by females in 2016. However **men continue to dominate creative departments**, with women accounting for just 29% of creative teams and 12% of creative directors in the UK. Women are much better represented in account handling positions, which have a 70% female to male ratio.

The gender disparity actually presents a huge opportunity for organisations who are willing to invest in creating a workplace with is attractive and accommodating to senior women, particularly working mothers. There have been numerous studies about the positive impact on innovation and creativity which comes from having equal male and female representation in leadership teams. So it naturally makes sense that digital and creative businesses which are able to retain high-achieving women are more likely to achieve success. For more information about some of the practical steps which organisations and their leaders can take to support the wellbeing of women in their organisation, please visit Guidant's Keeping Women In research project and series of vlogs.

## CREATIVE EQUALS – CREATING CHANGE

Creative Equals has been established as kite-mark to specifically drive equality in the creative industries and is actively working with employers and key industry influencers to instigate change. They have developed a charter to which employers and recruiters can sign up and also hold regular programmes for emerging talent, returners and mentors in the industry.

You can find out more and get involved here; www.creativeequals.org/

## ROLE MODELS

If you have successful women in your creative and digital teams, start promoting it and use them as ambassadors for your employer brand and the industry. Women across all sectors need successful female role models to aspire to!

**Nicky Bullard**, Chairman and Chief Creative Officer at MRM Meteorite was part of the team that won 10 DMA Awards in 2016. She is also the first female creative chair of a UK marketing agency. Previously Chief Creative Officer of LIDA, she not only judges almost every major award show but has also picked up many of those awards herself over the years.

Another female of note is **Claire Sandham**, Head of Brand who won gold with Diabetes UK. Last year's DMA Awards saw several more female award-winners in the gold category, you can check them out here;
www.dma.org.uk/awards/filter/curate/prizes/gold/years/2016

## ENGAGING A MORE DIVERSE TALENT POOL

The proportion of non-white workers in the creative sub-sector remains below average and advertising and digital marketing are also generally perceived to be a 'young person's game'. Indeed, 70% of digital marketers are currently aged 25-34. However, with our general populations living longer, older workers who are interested in staying in the labour market longer than their predecessors, represent an underutilised source of talent for employers. The government's Fuller Working Lives programme refers repeatedly to retraining opportunities for people aged over 45, and even for those approaching or past conventional retirement age.

Older workers are likely to have many transferable skills and keeping this experience within the workforce for longer will encourage the sharing of different perspectives, wisdom and insight. . Offering apprenticeships for older workers will also help provide opportunities to unlock the talent that is being underutilised across

all ages. The government estimates that within the next decade, we will need to fill 13.5 million job vacancies however only 7 million of that figure will be young people leaving school or college.

## PFIZER CASE STUDY

Here's a fantastic example from one of Guidant Group's clients Pfizer, as to how a 70 year old intern worked side by side with college students in their Corporate Affairs Department to everyone's advantage.

www.business.linkedin.com/talent-solutions/blog/future-of-recruiting/2017/the-story-of-this-70-year-old-intern-may-be-the-next-hot-trend-in-recruiting

## DISABILITY

It would be remiss to not mention disability confidence, as the proportion of employed, working age disabled people within the UK is shockingly low; **only 46% of disabled people are in work**, a full 30 percentage points lower than the non-disabled rate. This means there's an untapped pool of up to 3.5 million people who could be filling the skills gap (and forecasted skills gap) across the digital and creative sector. Businesses who take steps to increase the employability prospects for disabled people within their organisation will be at a significant advantage in the battle for talent.

To find out how you can reach out to disabled people and make a difference, please watch our video on becoming a Disability Confident employer:

www.youtube.com/watch?v=qkXh-1gwh3k

## BUILDING AN INCLUSIVE CULTURE

Employers within the sector generally recognises that the more diverse their teams are as a whole, the higher the chance they have of possessing a working culture that people enjoy and a place to work that people can feel proud of. There's no doubt that diversity of thinking also drives innovation and creativity, two things this sector wholeheartedly relies upon.

Research from Deloitte has found that organisations with inclusive cultures, when compared with those that lack inclusive cultures, tend to be:

- Six times more likely to be innovative
- Six times more likely to anticipate change and respond effectively
- Twice as likely to meet or exceed financial targets

However, improving diversity and inclusion (D&I) is unlikely to just happen without a concerted effort from employers. Organisations must proactively engage different groups of society and create a welcoming working environment where people from many different walks of life can succeed.

Deloitte's analysts have identified 6 key principles that are vital for becoming an inclusive organisation.

1. Make D&I a business priority, not a compliance process
2. Don't just be diverse, be inclusive too
3. Inclusive culture begins with inclusive leadership
4. Embed D&I into every facet of talent management
5. Empower your people with resources to champion D&I and take action
6. Concentrate on all D&I-related achievements, not on metrics tracking

## THE NEXT GENERATION OF TALENT

The digital and creative industry can only continue to thrive if it maintains a strong pipeline of talent and that means **working harder to appeal to emerging talent**.

Helping people to understand the plethora of creative and digital roles now available and what might suit them is a vital starting point. In line with this, the DMA has devised a mentoring programme to support young talent getting started in the marketing industry.

There is also a need for employers to engage more and earlier with students, to help them understand the skills needed for the types of career they are interested in. Increasing the proportion of courses that include work placements could support this.

### CREATIVE SKILLSET

Creative Skillset is a UK-wide strategic skills body that works with employers, individuals, trade associations, unions, learning and training providers, government and its public agencies and other key organisations to ensure that the UK's creative industries have continued access now, and in the future, to the skills and talent they require.

It supports skills and training for people and businesses to ensure the UK creative industries maintain their world class position.

### DMA

The UK Direct Marketing Association (DMA) is a trade body which is committed to advancing the marketing industry. It provides its network of 1,000+ UK companies with access to research, free legal advice, political lobbying and industry guidance. Importantly, the DMA also champions the training and development of digital and creative professionals by providing access to dozens of specialised courses, ranging from awards to certificates to professional diplomas.

By sharing and enhancing knowledge, the DMA seeks to help businesses grow by unlocking the potential of talented individuals who'll shape the future of this industry.

## COMMENTS FROM KATE BURNETT, MD AT DMA TALENT:

The next generation is clearly the future of our industry, but it's important that we ensure they are coming in with the ideas and skills that can deliver real value for the companies they join. Growing up with technology in a way that previous generations simply never had is a great starting point, but as organisations we need to ensure they also have the core skills we need – whether they are acquired from the education system or as they enter the industry.

The new jobs we've seen appear in recent years are the biggest challenge, as teachers, lecturers, parents and even businesses in some cases simply don't understand the roles. Naturally making them cautious about recommending these new professions or the best people for them, at worst this could mean great talent is diverted to 'safer' traditional professions outside of marketing.

All is not lost though, as the marketing industry is also in a unique position with the incredible diversity of career opportunities we have to offer. Whether you're analytical, creative, an organiser, a natural salesperson or anything in between, you can find a role that suites you in marketing. As an industry, we need to be more proactive in talking about this diversity of opportunity to young people while they're still learning, as well as those with the right skills that might have initially taken a different career path.

I believe strongly that employers should get involved in this process as early as in schools. Organisations like the Careers and Enterprise Company, which runs mentoring programmes and have over 1,700 senior business representatives volunteering in schools as Enterprise Advisors, are available to help.

Independent organisations and recruiters themselves also have an important role to play in the education of students, whether at school, college or university, but for a long term solution we need support from government and industry bodies. That's why we launched our Creative Data Academy programme, which is expanding this year to be a nationwide opportunity for university students to learn how important data is in our industry through interactive sessions.

As well as attracting this talent, we must also ensure they have are able to grow and learn once they have come into our industry. Training is one element of this, but mentoring is another valuable development tool, whether it's internal or external. The DMA Mentoring scheme, for example, offers the opportunity for junior staff to receive mentoring from a senior marketer that comes from outside their business, making them able to act as a true sounding board without the restraint of internal politics or policies.

Ultimately, there is no single solution to the challenges ahead. The key is to continue to hire the right people with the right attitude, motivation and basic skills. Going on to ensure we're offering this talent the right opportunities, grown and train into the experts we want them to be. If we keep doing this from line manager to industry association, we will all continue to grow and succeed in to the future.

## APPRENTICESHIPS

The government's Apprenticeship Levy also holds significant opportunity to support more people keen to develop a career in the sector. Introduced from 6 April 2017, the levy requires all employers operating in the UK, with a pay bill over £3 million each year, to invest in apprenticeships. However, while some remain uncertain about the levy's benefits, organisations' contributions can be put towards training additional apprentices or, alternatively, can be used to **upskill current workers** through more advanced training. With the appropriate support and targeting, apprenticeships could facilitate a greater volume of talent coming from a wider variety of backgrounds – something that can only be of benefit to the industry and its clients.

It's important to note that **apprenticeships are not just for young people** – some companies are currently offering apprenticeship schemes which have been created in order to 'extend opportunities' and give 'support to adults over the age of 24 wishing to get back into the workplace.' The UK government estimates that more than **40,000 over 45s will undergo an apprenticeship in the next year**. Promoting these opportunities and encouraging older workers to apply for apprenticeships could help strengthen the economy by making sure people of all ages are able to find and retain skilled jobs.

# HOW CAN EMPLOYERS APPEAL TO TALENT?

## JOB SATISFACTION

Overall, satisfaction in the creative marketing and digital disciplines is high, with around **70% saying they are largely satisfied in their current role**. The highest satisfaction levels are present in content, editorial and social, followed by PR and marketing.

Employees within the creative sector are generally driven by the **type of work they can be involved with, quality clients and innovative approaches to collaboration and problem solving**. Employers should focus on promoting the benefits to prospective talent via engaging career related content that resonates with their audience and gives candidates a feel for what they will be exposed to in their role.

## FLEXIBILITY AND THE 'GIG' ECONOMY

The need for a better work-life balance has become increasingly more desirable for all, with **flexible working the most sought after benefit** favoured even more highly than bonus.

The emergence of contingent talent pools is giving organisations access to a larger source of freelancers or contract labour, whenever and wherever they need it. Contingent work is increasingly common, with companies contracting independent workers to fill skills gaps on a short-term basis.

Employees continue to value **variety and flexibility** as they seek work-life balance. With almost every piece of technology connected to the cloud, **employees can work remotely** – from home or the other side of the world. Evidence from an EY survey shows that 80% of 'giggers' appreciate the flexibility of contingent working and 33% enjoy being able to work from home.

## AESOP CASE STUDY

Aesop was created to bring the disciplines of branding and advertising closer together through the power of storytelling. To do this well our people have to excel at working outside of the historic delineation that has existed in the world of communications. It therefore goes without saying that we have to reflect that flexibility in the way that we allow our employees to operate. We try to see the whole person, not just the person when at work. Later starting times or earlier finishes for those with families and the opportunity for sabbaticals are just a few of the ways we embody this. We always base any training on an individual's needs rather than following an existing programme. We also have a women's mentoring scheme to support and encourage more of our female staff to take senior positions within the business.

– Roger Hart, CEO at Aesop

## WELLBEING

All employers have the potential to influence the wellbeing of their staff. Where employers are able to raise wellbeing in their workforce, they are also likely to see improvements in the performance of staff. However, one size does not fit all, and it's important to tailor your approach, train your managers and to demonstrate a commitment to a fair and organised strategy.

One way to monitor wellbeing is to move away from annual appraisals and have more frequent reviews/conversations with employees. An annual appraisal has been likened to throwing darts at a dartboard blindfolded, and only being shown your score 12 months later. Both positive and negative experiences will have faded, and the opportunity to learn from mistakes or to capitalise on successes may have been lost. In recent years there has been an increasing trend for businesses to move away from the traditional annual appraisal to a process of ongoing performance review or 'mini' appraisals throughout the course of the year. An ongoing process can be more manageable and meaningful for all concerned.

Pioneering initiatives such as Open Blend Method, which Guidant Group has adopted, can replace annual staff reviews. This innovative technology platform acts as an enabler for monthly open and honest conversations between managers and their teams, and places employee wellbeing at the centre of the business.

The importance of employee experience is growing massively and the successful companies of the future will be those that invest in building a dynamic, happy and fluid workforce with a strong sense of culture.

## LIDA CASE STUDY

At LIDA we recognise that our people are our greatest asset. Because we're not manufacturing a physical product, we're only as good as our creative ideas, our strategic thinking, our ability to service our clients and the quality and efficiency of our delivery. We come to work to help our clients be the most valued brands in the world, but we can only create the world's most valued brands if we truly value our employees and in turn, aspire to be a valued employer. Of course there's a strong commercial rationale: "Companies with superior talent management practices generate 26% higher revenue per employee than their peers." (Bersin by Deloitte). But it's not just the commercial upside that's relevant. The reason companies like Google, Facebook and Netflix place such great focus on Talent, is because they've finally worked out there's a very real value exchange between employers and employees:

"Companies with staff who add value by being highly engaged outperform those with the most disengaged staff by 89% in customer satisfaction and by fourfold in revenue growth". (Harvard Business Review)

"The #1 factor for employee happiness is being valued for their work". (BCG)

...So we work hard to make LIDA a place where people feel stimulated by the work, have great opportunities to progress, and feel valued on a professional level.

At LIDA, we've identified the 4 main drivers for employee engagement for our staff and have built the foundations of our talent strategy around these pillars:

- The opportunity to create work that matters
- Exceptional management and leadership
- The opportunity to progress and develop
- Personal growth

We have an enviable training program for staff to benefit from discipline specific training such as 'Generating Insights' or 'Advanced User Experience'*, coupled with training on general professional skills such as 'Authentic Leadership' or 'Presentation Skills and Storytelling'. We have an annual course for Account Directors which focuses on managing client relationships, and getting results for the brands we work with, and we even have an ex-client who trains staff to get it right. We complement this vocational training with monthly Wellbeing training and events which are designed to support the 'whole self' such as Mindfulness, Nutrition, Yoga and Massage. Because LIDA has a very friendly, open and inclusive culture the wellbeing activities are a natural way for us to actively support the health and happiness of people within the LIDA family.

# GUIDANT GROUP AND GEMINI

Guidant Group is an award-winning recruitment outsourcing provider and part of Impellam, one of the UK's largest staffing companies.

We've been delivering innovative MSP and RPO services and streamlining workforce management processes for some of the world's largest companies for decades.

As such, we're experts in delivering high quality, tailored recruitment outsourcing services that simplify complex recruitment processes and save you time and money, while reducing risk.

Guidant's supplier and strategic partner relationships have also helped us win APSCo's coveted RPO/MSP of the Year Award in 2016 and 2015. Thanks to the long-term, harmonious and collaborative relationships with the very best recruitment partners, we can fill every vacancy every single time.

When it comes to the Creative Industries, our strategic partners Gemini People can be relied upon to deliver the quality of talent our clients need! The team are well-versed in delivering innovative recruitment solutions at scale and within the exacting timeframes and quality standards our world-leading clients rely on.

If you would like to find out more about our joint outsourced recruitment services and how we can help you manage any aspect of your recruitment function, please do not hesitate to get in touch:

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