



Alter

your trajectory

salary, market insights
& sentiment **survey 2019**



The
Marketing
Institute



our tribe changes the game by **NOT ACCEPTING ordinary**. They are growth agents & customer evangelists, driving transformation in a data driven, digitally enhanced age. **THEY LIVE AT THE FRONT OF TRENDS** and new technologies, bringing insight, understanding and **innovation** to their customers. They recognise that to be truly successful they must put the **customer at the heart** of their company strategy. Our tribe builds outstanding brands and businesses. **Our tribe powers growth.**



salary, market insights & sentiment **survey 2019**

We are delighted to share the results of the 2019 Salary, Market Insights & Sentiment Survey. It is developed by Alternatives in conjunction with the Marketing Institute of Ireland and is the sixth year of our collaboration.

This is the largest survey of its type in the marketing, digital, data and customer focused community across Ireland, with over 1,000 respondents. It provides detailed, cross sectoral and benchmarked data on salaries & benefits and tracks the evolution of sentiment in the market and engagement within the community.

In this year's survey the community continues to operate within a positive environment, however the uncertainty around Brexit is clearly beginning to impact on the future trading outlook and levels of preparedness for Brexit are of concern.

Employment is high, the market for good talent is competitive, salaries have increased and people feel secure in their roles. However engagement remains an issue to be addressed.

We hope it is a useful source of data and insight for those whose remit it is to drive growth through a customer and market orientation. We hope it will also help guide those leading a team or function or the professional seeking to drive the continued growth of their career.

Thank you again for participating in this survey. Please connect with us if you are interested in a bespoke presentation for you or your team.



Bernie Keogh
Managing Director,
Alternatives Group



Tom Trainor
Chief Executive,
Marketing Institute of Ireland

content

1	Survey participation	5
2	Market sentiment	7
3	The evolving role of marketing	10
4	Marketing resource, budgets and spend	15
5	Salaries & benefits	17
6	Engagement, security & future	29
7	The gender dimension	33
8	Sectoral analysis	36
	The Sponsors	46

Please note that all content of this survey is the copyright and intellectual property of Alternatives and should not be used without the prior written authorisation of same.



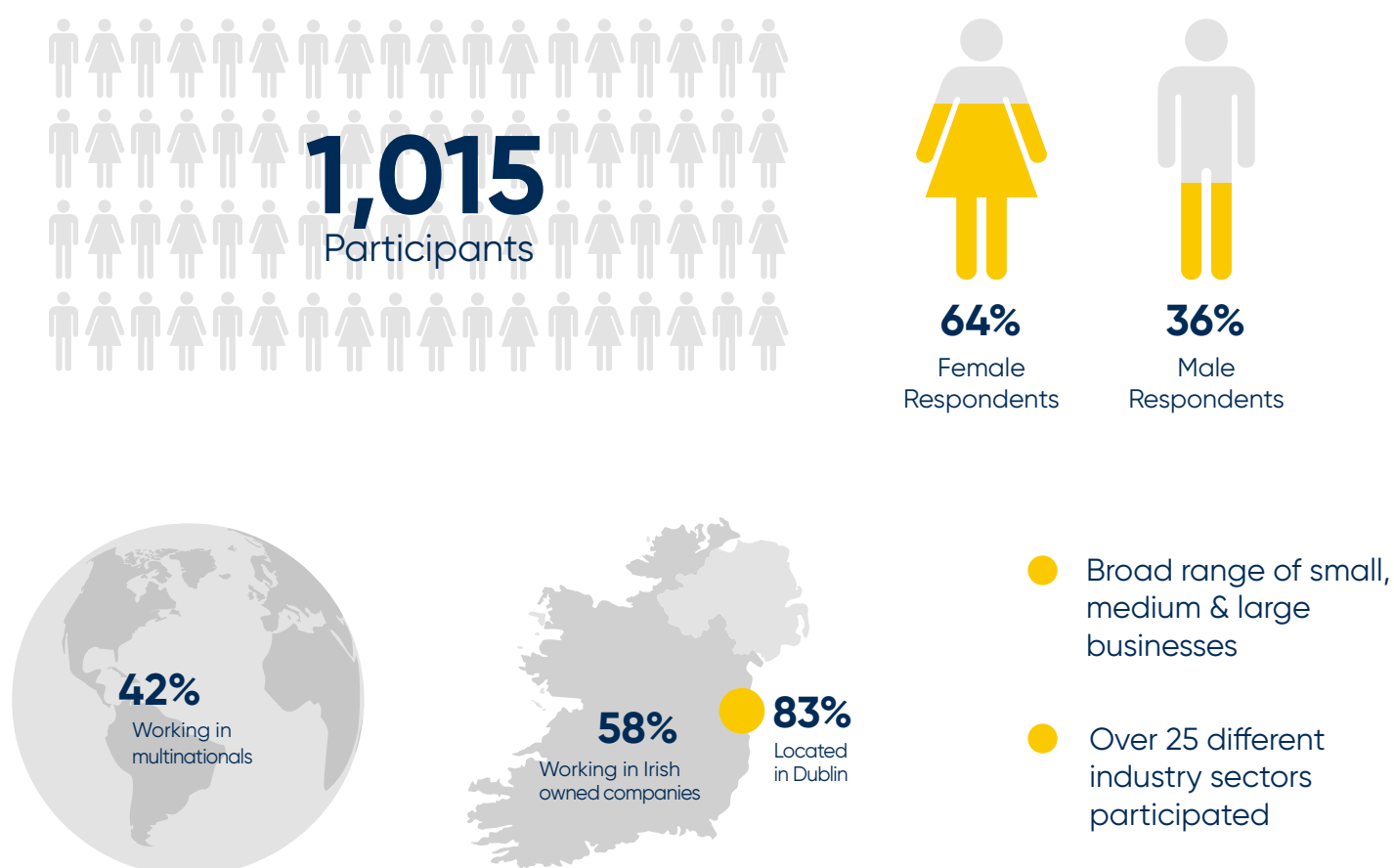
1. survey participation

Snapshot

The annual Salary, Market Insights & Sentiment Survey is the largest, go to survey and reference point for the marketing, digital, data & customer talent community.

With 1,015 respondents this year it provides real insight into current consumer and market sentiment, with Brexit in the immediate background. It looks at the evolving role of marketing and the strategic role it plays; how it is resourced and what the focus and skill sets are required to future-proof it. It captures the current level of engagement and future aspirations of respondents. Importantly it provides unparalleled, benchmarked information on salaries & benefits by sector, level and gender of this community.

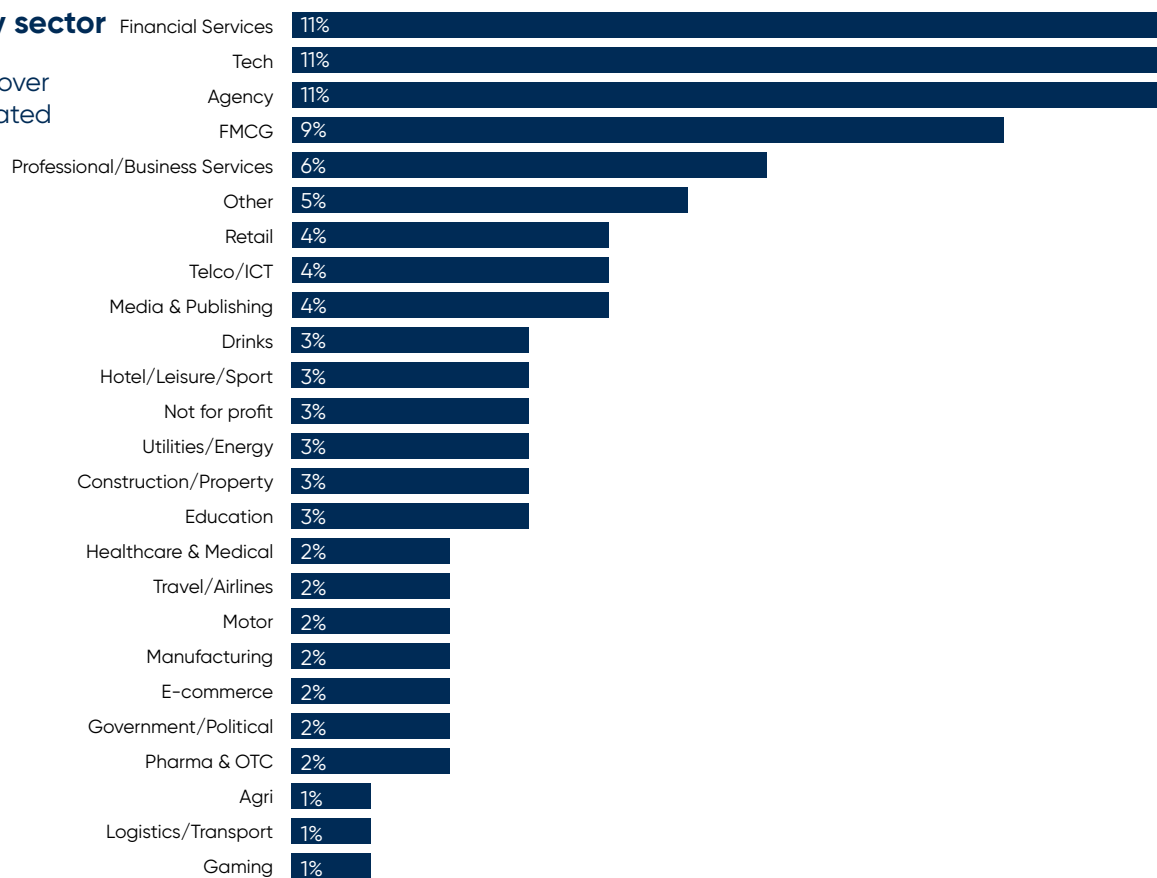
The survey was conducted between June and August 2019.



1. survey participation

Respondents by sector

Respondents from over 25 sectors participated in this survey.



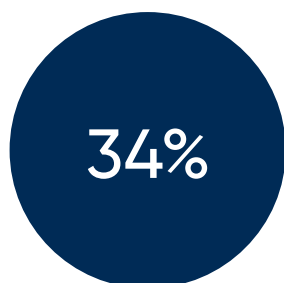
Respondents by level

67% of survey participants are at mid to senior level and have budget and people responsibility.



Head of/DIRECTOR

With budget and people responsibility e.g. Commercial Director, Head of Marketing



MANAGER

Typically with budget and people responsibility e.g. Marketing Manager



PRACTITIONER

5 to 9 years' typically e.g. Brand Manager



SUPPORT

First to second role in career -1 to 4 years' experience typically e.g. Marketing Executive

2. market sentiment & brexit

In this section we review sentiment in the market and how trading is expected to perform in the year ahead. With Brexit looming we take a deeper dive into both the potential impact of Brexit by sector as well as the level of preparedness by sector for same.

How is client or customer sentiment in your marketplace vs last year?

Although sentiment remains positive, it is not as upbeat as previous years. 48% felt that customer sentiment in their marketplace had improved a little or a lot, down from 62% in 2018 and 68% in 2017. Those in logistics/transport (86%), tech, media/publishing, hotel/leisure, not for profit, healthcare/medical, construction/property and telco/ICT sectors (53%) were the most positive.

17% of respondents feel sentiment worsened vs only 7% this time last year and sentiment was most negative in sectors such as motor (56%), agri, gaming, FMCG, e-commerce, healthcare/medical, manufacturing and media/publishing (24%).

	2017	2018	2019
A lot better	18%	16%	12%
A little better	46%	46%	36%
The same	27%	32%	35%
A little worse	8%	6%	15%
A lot worse	1%	1%	2%

How do you expect trading conditions to perform over the next 12 months?

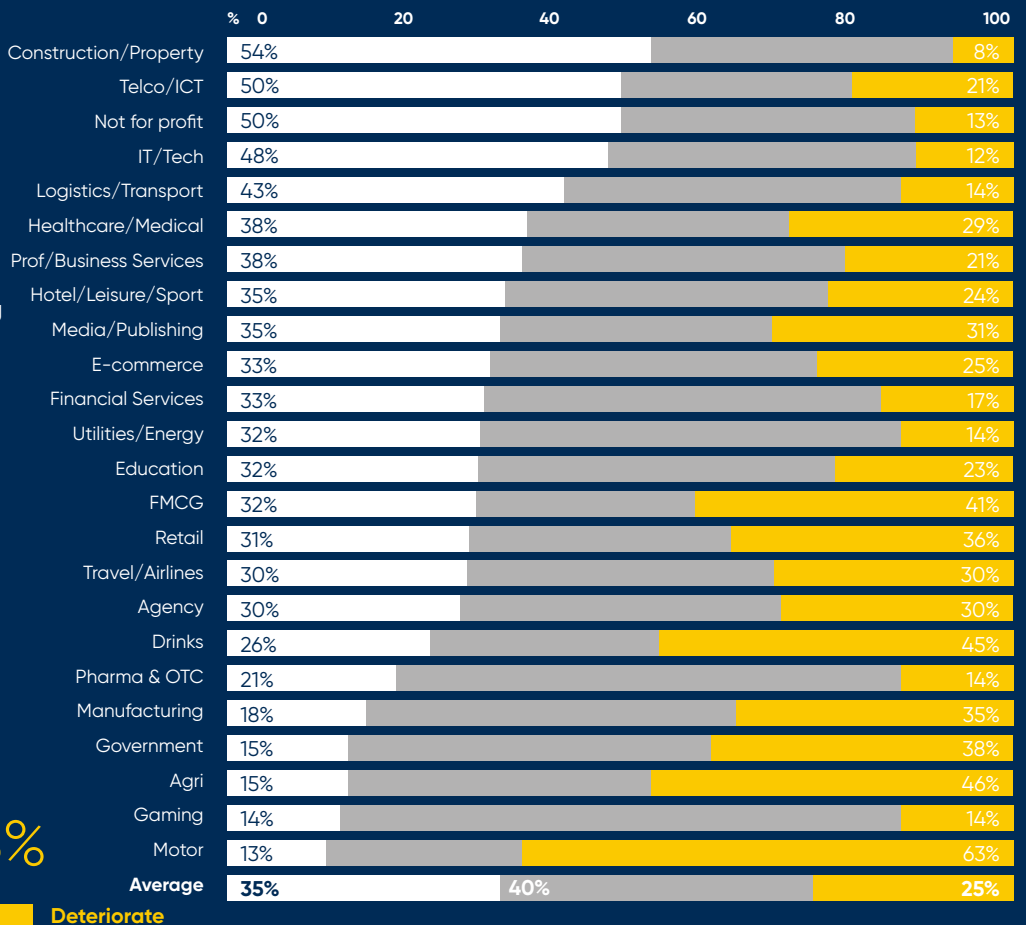
Brexit and other global political factors are impacting negatively on future outlook.

Only 35% of respondents feel that trading conditions will improve in the year ahead, down significantly from 55% last year.

40% expect conditions to stay the same and a high 25% expect trading to deteriorate in the next 12 months vs only 7% the same time last year.

The sectors with the most positive outlook are construction/property, telco, not for profit, tech, logistics and healthcare.

The motor, agri, drinks, FMCG, government, retail and manufacturing, all of whom are more Brexit exposed, anticipate worse than average future trading conditions.



TOTAL

35% 40% 25%

Improve Stay the same Deteriorate

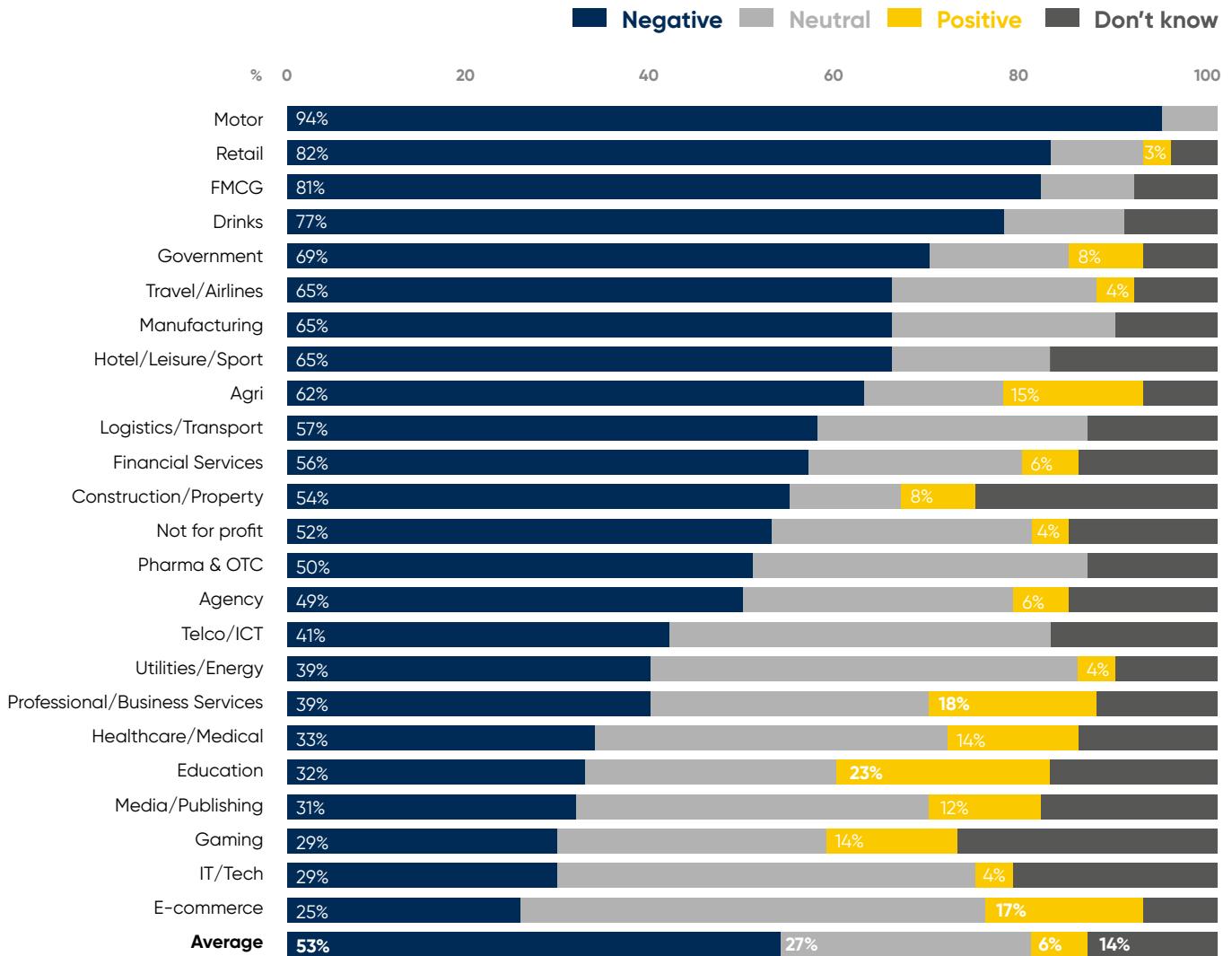
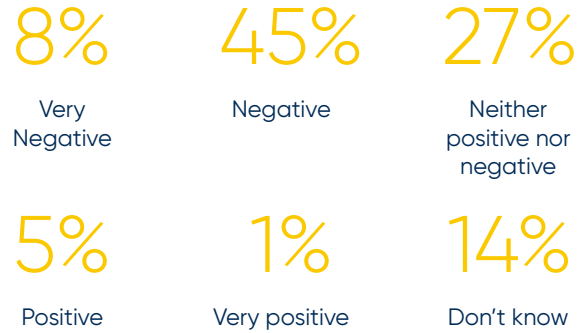
2. market sentiment & brexit

What level of impact do you expect Brexit to have on your organisation in Ireland?

During this survey data capture, a deadline of 31st October had been given for a Brexit departure and a no deal scenario remained a potential outcome. In this context it is not surprising that those who feel Brexit will have a negative or very negative impact on their organisations in Ireland has increased from 36% last year to 53% this year, with a further 15% uncertain how it will play out. Indeed just 6% vs 10% last year expect it to have a positive impact.

Sectors that appear most concerned are consumer businesses and those with strong trading relationships with to the UK market. These include motor (94%), retail, FMCG, drinks, government, travel/leisure, manufacturing and agri (64%).

Those in gaming, construction/property, tech, media/publishing, education, hotel/leisure and telco/ICT are relatively more positive than other sectors.



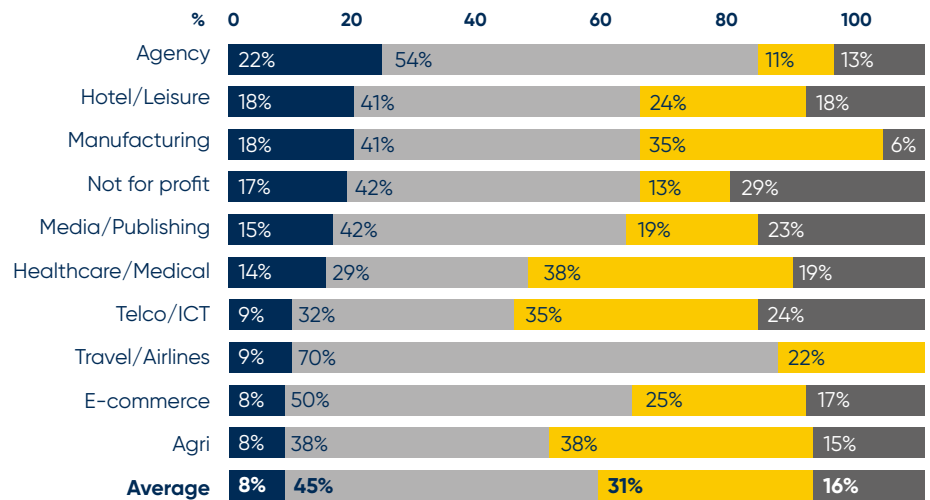
2. preparedness for brexit

How well prepared is your organisation for Brexit, do you feel?

This year we asked respondents how prepared they felt their organisations were for Brexit. Just under one third feel their organisations are well prepared for Brexit. Those working in large organisations and for multinationals consider themselves most prepared. 45% of all respondents feel their companies are only somewhat ready and highest levels of concern are amongst SME's.

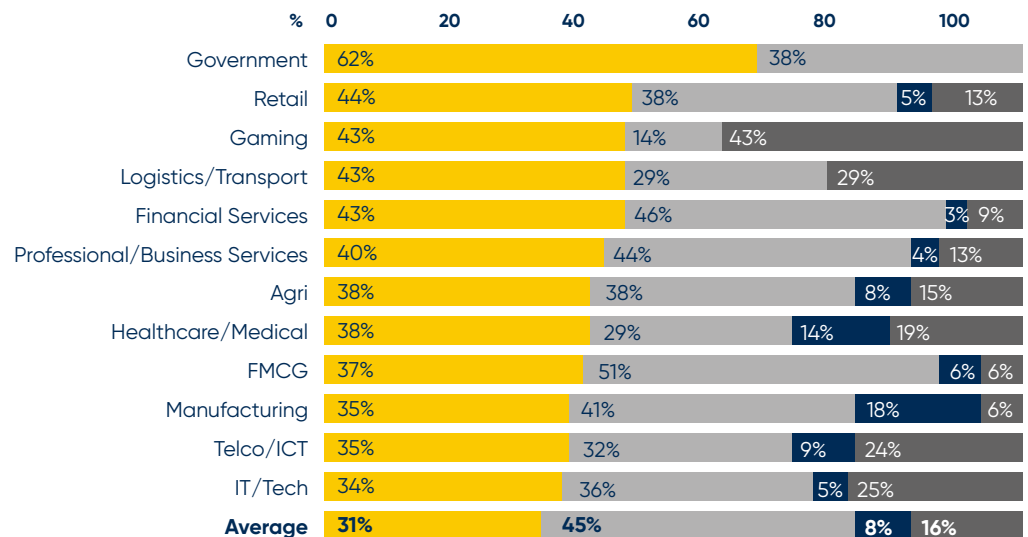
Least prepared vs average

- Not at all prepared
- Somewhat prepared
- Well or very well prepared
- Don't Know



Best prepared vs average

- Not at all prepared
- Somewhat prepared
- Well or very well prepared
- Don't Know



Irish owned	9%	48%	27%
Multinational	9%	41%	35%

1-50 employees	15%	47%	18%
51-200	10%	47%	26%
201-500	9%	50%	33%
500+	4%	39%	40%

3. the evolving role of marketing

In this section we explore the current role of marketing, how strategic a function it is now considered and the level of board representation it enjoys. We explore marketing's remit and influence on customer focused areas within their organisations, outside of classical brand, communications and marketing management.

Marketing as a function has long battled with perceptions of its role and its value add. What is clear is that a long term customer led approach delivers. What is often less clear is who owns or influences the customer agenda within organisations.

Again this year we asked participants if the marketing function is perceived as playing a strategic role in their organisation and specifically if marketing had board representation.

Hoping for an upward trend in board representation it was disappointing to see that just 39% of respondents said marketing was perceived as strategic and also had board representation, down from 43% last year.

61% of respondents said the marketing function, whether represented on the board or not, was perceived as strategic, down from 64% last year. With 20% rating it as support and 19% somewhere in between, there remains considerable scope to further drive both the remit and reputation of the function.

Unsurprisingly marketing plays the most strategic role and is represented at board level in sectors that are very consumer brand focused such as drinks, FMCG and retail. It also is seen to play a strategic role in the telco, tech, transport, travel, financial services and e-commerce sectors, which are increasingly customer, data and insight led.

It continues to play more of a support role in sectors such as education, healthcare, construction/property and utilities.

Which of the following best describes how the marketing function is perceived within your organisation?



3. the evolving role of marketing

Which areas fall under the lead remit of the marketing department?

	Marketing is lead	Responsibility shared with other function(s)	Lies elsewhere	N/A
Digital communications	77%	13%	5%	4%
Digital strategy	68%	19%	9%	4%
Lead generation	35%	29%	23%	13%
Customer experience	35%	38%	22%	5%
Data analytics	33%	31%	28%	8%
Proposition development	32%	32%	27%	9%
E-commerce	30%	23%	22%	25%
Business strategy	22%	48%	26%	4%
Product management	21%	26%	44%	10%
Pricing	15%	24%	50%	10%

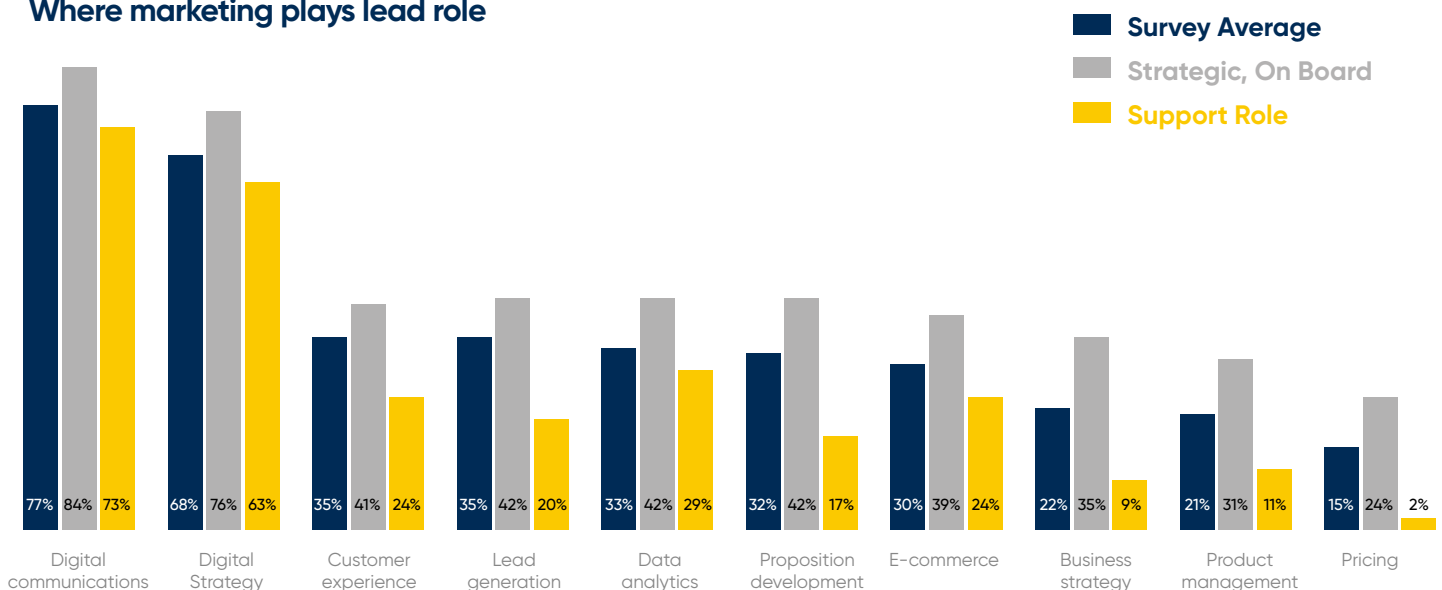
Marketing will add most value and be perceived to do so when it truly influences the customer agenda and the stakeholders involved. The marketing function continues to play the lead role in digital strategy and communications and indeed these are now almost fully led by marketing as digital becomes simply a way of being, connecting and operating.

However in most of the other areas marketing is playing less of a key role than last year. Product management declined from 26% last year to 21% this year and data analytics from 38% last year to 33% this year. This in turn will have an impact on how marketing can impact across the organisation and how it is ultimately perceived.

In the chart below we look at the areas where marketing (survey average) plays a lead role across these customer areas compared to companies where marketing is considered strategic and is on the board.

Marketing is considered more strategic when it is playing a greater lead role outside the classical brand, digital and marketing management space and across all strategic customer touchpoints, particularly in the areas of proposition development, business strategy, product management, CEX and data analytics. These are the role remits and skill sets to develop if marketing wants to drive strategic value for the organisation.

Where marketing plays lead role



3. the evolving role of marketing

The role of Marketing is multidisciplinary in nature and is continually being redefined due to digitization. This continual evolution can make it difficult for non-marketing leaders to truly understand the discipline. It can leave organisations struggling to determine what role marketing should play in their organisation, what type of marketing leader they require, what structure is best and what marketing skills they need.

Marketing remits vary from C-suite P&L roles to support functions in different sectors

Our survey results demonstrate that there are significant variations in the remit of the CMO function and the role of marketing within different organisations and different sectors. In some sectors, such as FMCG, Drinks, Retail and Telcos, marketing has significant board representation, with heartening increases in board representation also recorded in sectors such as Tech (up to 41% vs 22% last year) and Financial Services (32% vs 25% last year) year on year.

In these sectors **marketing is recognised as a crucial function** with enterprise wide responsibility for designing strategies to deliver profitable business growth through data analytics, customer insight, brand strategy, innovation, product and proposition design, omni channel management, pricing, communications and customer experience.

Typically, CMOs or Marketing Directors in these sectors will have P&L responsibility and run their brands or products as businesses. Marketing is considered to be both a science and a creative discipline and marketers in these organisations are more likely to focus on in-depth marketing effectiveness understanding, providing their marketing teams with the tools they need to accurately gauge the effectiveness of their campaigns in different distribution and media channels. This in turn enables them to have robust discussions with finance and the board on their short and long term value add.

In addition the organisations where marketing is represented at board level tend to invest significantly in training, upskilling and developing their marketing teams in strategic, financial, creative and leadership skills. It is no wonder that these sectors produce the finest commercial marketers who can both drive short term revenue and build the perception of

the brand/ organisation in the long term thereby increasing shareholder value.

Compare that to the role of marketing within the many sectors where marketing has very low board representation or is considered a support function. In these sectors marketing can be confined to playing a narrower role with responsibility for marketing communications, promotion, events, digital, content creation, advertising and social media. Marketing leaders in these sectors can struggle to demonstrate their value add to the same degree as other functions, as they lack the remit and tools to play a more strategic and commercial role.

Organisations need to ask if they are limiting the potential of marketing in their organisation

The organisations which low ball marketing are missing an opportunity, particularly as consumer and customer interfaces are vastly more complex now as a result of digitization. The marketing function is becoming more, not less important to businesses as new platforms and ways to engage and build relationships with consumers emerge and as customers' expectations increase. C-suite CMOs and Marketing directors are best placed to align strategic and commercial goals of the business with those of its customers whose voice they represent at the board table.

The challenge for marketers to prove their effectiveness

Many argue that it is up to the marketer to demonstrate their value add in their organisation, and to lean into the metrics and numbers that matter to the board, and although this is true, it's an overly simplistic view. A marketing team too narrowly focused in an organisation has very little chance of truly demonstrating its effectiveness and of elevating its role, unless the organisation itself is open to redefining its remit and making the necessary investment in people, skills, tools and training.

If organisations want marketing to add more value higher up the chain, they need to prioritise marketing as they do sales

3. the evolving role of marketing

and other key functions in the organisation and to invest in experienced, commercially focused strategic marketers who can take on P&L responsibility for brands, products and services and deliver innovation and growth based on customer insight and new technologies.

Marketers need to carefully select their career path based on their long-term career ambition

The varying ways in which marketing is perceived and the way the marketing remit differs in different organisations and sectors needs to be very carefully considered by marketers.

If a marketer wishes to own both a strategic and commercial agenda and ultimately aspires to general management, then it is vital to choose an organisation and sector in which marketing plays a growth driving role.

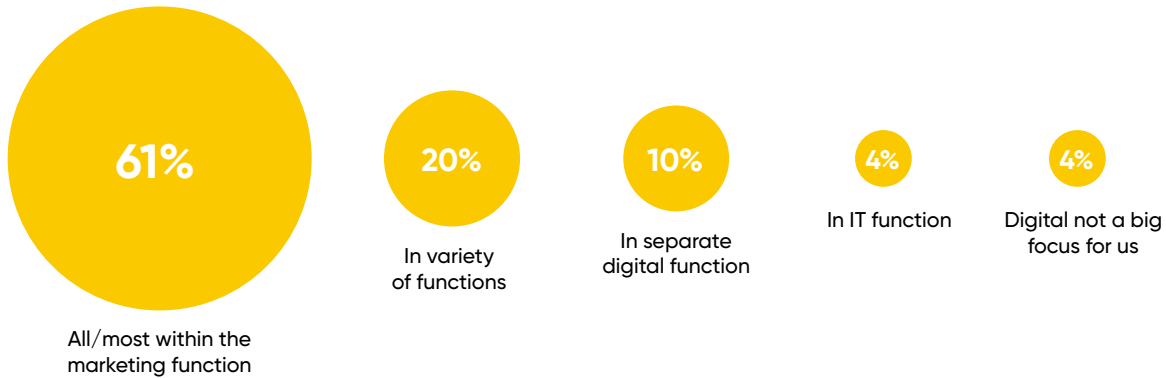
If on the other hand, a marketer aspires to become a leading specialist in a particular field of marketing, for example strategic planning, innovation, product management, e-commerce, UX, digital, CX or advertising then they need to look to the sectors in which those functions are essential.

In any case it is the onus of the marketer to take responsibility for ensuring that they align their talent and potential to the organisations and sectors which are best going to enable their personal growth.



3. the evolving role of marketing

Where responsibility for digital lies

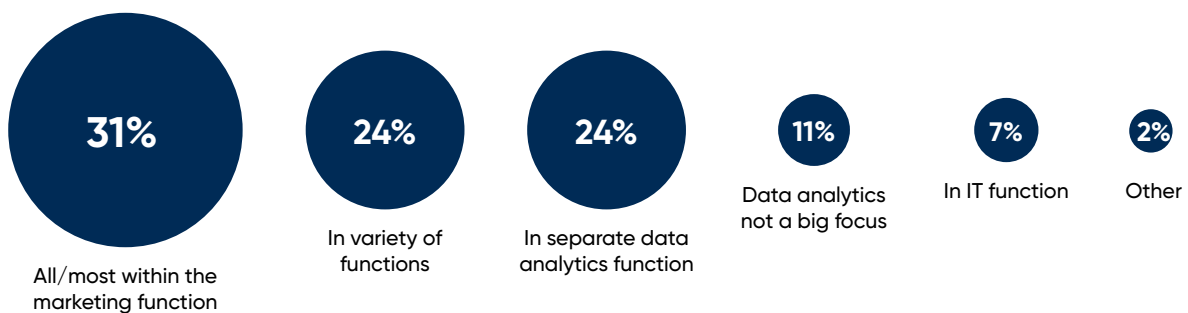


These results are little changed vs last year, with the exception that "digital" is now less likely to sit in a separate digital function (12% last year vs just 10% this year).

This reflects an ongoing trend where digital is integrated across the complete organisation, from operations, to sales channels, customer experience, engagement and communications.

That said the marketing function retains lead responsibility for digital strategy and communications. Although there is still demand for digital specialists, digital skills are simply becoming the norm. Demand is now greater in the areas of SEO, PPC, programmatic, social media and content.

Where responsibility for data analytics lies



Marketing taking lead responsibility for data analytics has declined 4 points, from 35% last year to 31%, with more now sitting within a separate data analytics function (24% this year vs 22% last year).

This is a missed opportunity for marketing, given the growing importance and strategic value of data. Ownership of data would allow the marketing function further develop its scientific and customer insight capability, enhancing its strategic reputation.

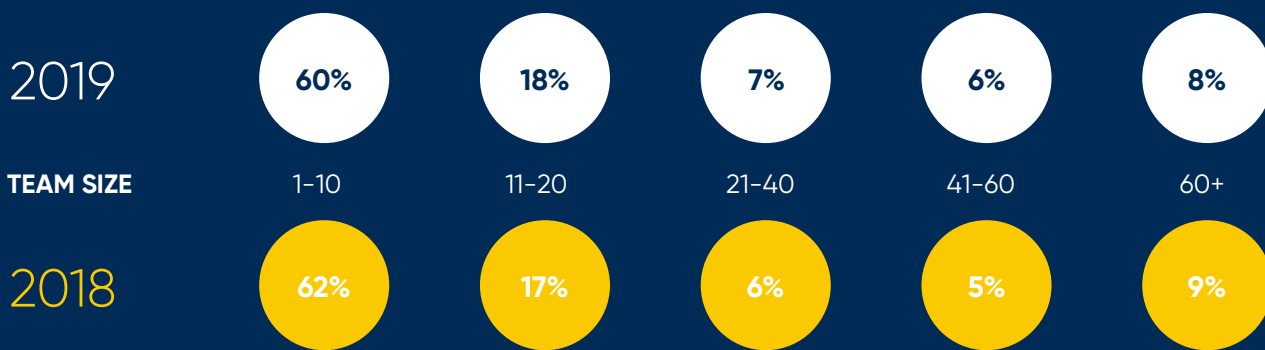
4. marketing resource, budgets and spend

In this section we review the marketing resources available to achieve objectives, both in terms of headcount and budgets.

Marketing team size

Teams are relatively small, with 60% of respondents working in teams of 10 or less and 42% in teams of 5 or less. That said all teams have increased slightly in size since last year.

52% of respondents in Irish owned companies have marketing teams of 5 or less (vs 57% last year), compared to 28% of multinationals. 21% of multinationals have teams of 40+ compared to just 10% of Irish owned companies.

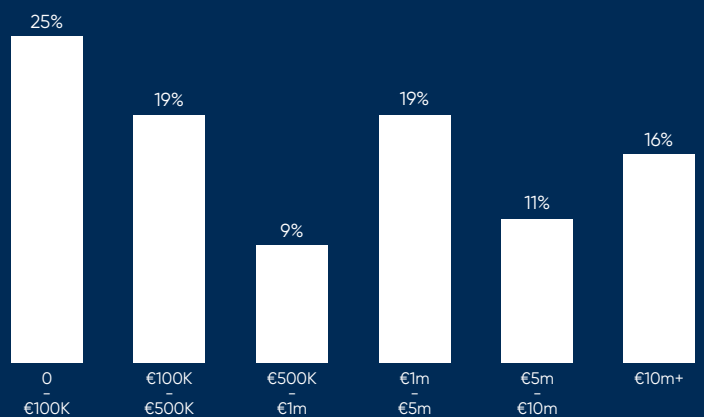


Estimated marketing budgets for 2019-2020

Budgets also remain tight, with 44% planning to spend €500k or less, similar to last year. However there is a shift from last year where those planning to spend €500k-€1m has decreased from 22% of respondents to 9%, with a corresponding uplift of those planning to spend in the €1-€5m range. Those planning to spend over €10m has also increased from 11% to 16% of respondents. Sectors with the greatest budgets are drinks, gaming, e-commerce, telco, retail, financial services and FMCG.

29% foresee an increase in investment, similar to last year, with 16% anticipating a decrease in spend.

As with previous years there are higher budgets invested by larger companies and by multinationals.

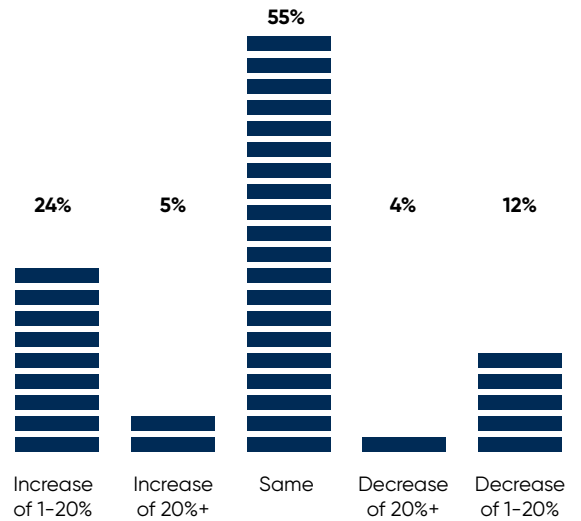


	0 - €100K	€100K - €500K	€500 - €1m	€1 - €5m	€5 - €10m	€10m+	TOTAL SURVEY
Irish owned	35%	22%	8%	16%	8%	10%	59%
Multinational	11%	14%	11%	23%	16%	25%	41%

4. marketing resource, budgets and spend

Are your 2019-20 estimated budgets likely to increase or decrease?

Despite Brexit uncertainties, 29% foresee an increase in investment, similar to last year, with 16% anticipating a decrease in spend, up slightly from last year.



Top three areas of marketing spend over the next 12 months

Top areas of spend are much as recorded last year, with ATL and digital continuing to dominate and events remaining in the top 3 for the second year running.

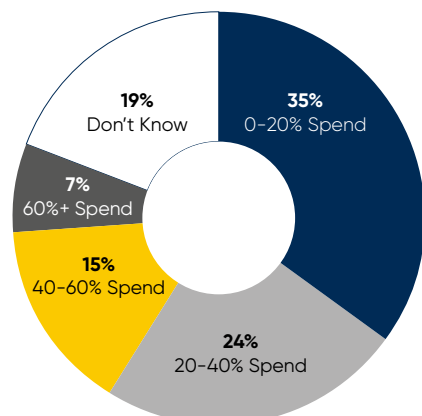
Peter Field and Les Binet's now-famous 60/40 ratio rule of thumb is that marketers spend approximately 60% of their budget on long term brand building and 40% on short term sales activation, which is the more performance-led, or direct-response type activity.

However we see from this survey that there is more focus on shorter term tactical investments to the detriment of longer term brand building. Only 7% will dedicate 60% or more of their budget to long term growth. One third of respondents will invest less than 20%. Those most likely to invest more in longer term brand building include the drinks, government, healthcare, financial services, telco, FMCG and retail sectors.

% of respondents top 3 areas of spend



What percentage of the marketing budget do you estimate will be spent on long term brand building this year?



5. salaries and benefits

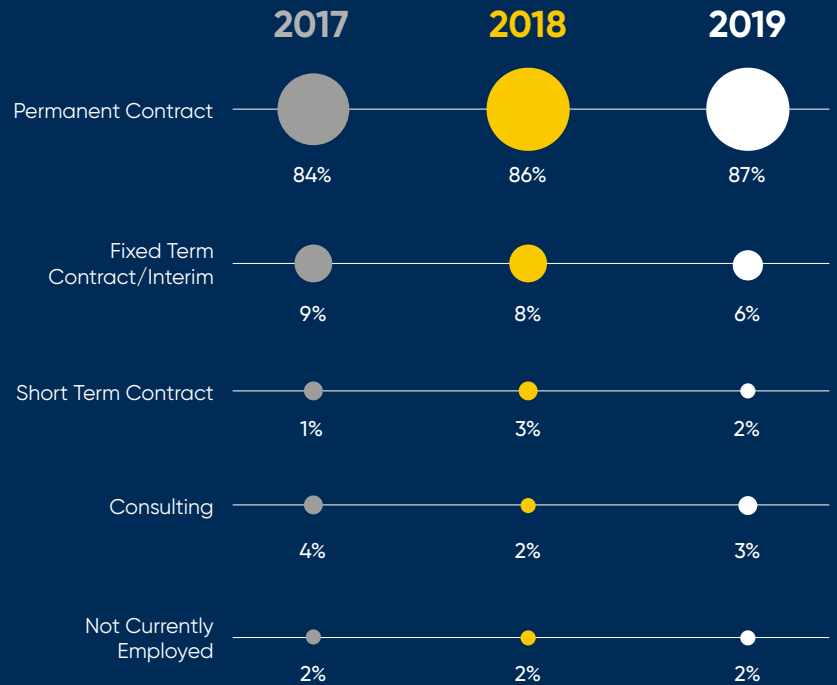
In this section we review salaries and benefits overall and by role and career level.

Employment contracts

With the buoyant market and the strong demand for talent there is a continued but modest increase in those on permanent contracts. This particularly applies at senior level, 90% of whom are on permanent contracts vs 80% of junior level respondents. Male respondents also are more likely to be in permanent roles (90% vs 87% of females).

There are relatively more support and practitioner level respondents on fixed term contracts-15% and 8% respectively vs only 2% of directors-but this also is down on last year when 19% and 10% were on fixed term contracts. Again this reflects the strength of the market and the competition for employees at this career level.

Again this year 5% of respondents are on short term and consulting contracts and we continue to see demand for flexible contracts from both clients and candidates, for gap fill for sick leave or maternity leave and for shorter term project assignments.



Movement in salaries

The upward pressure on salaries continued this year and 63% of respondents got a salary increase in the last year, up from 61% the year before. Support level respondents got less salary increases than average-53% vs an average of 63%-but this would be normal, given that many would only be starting out in new roles and may not be in consideration for increases.

The cohort of practitioner level respondents with 4-9 years' experience is highly solicited, particularly by multinational and large corporates and this is evidenced by salary increases recorded. 64% of practitioners got a salary increase vs 58% last year; 14% getting an increase of 6-10%, vs 9% the year before. 68% of directors got an increase vs 64% last year and 63% of managers got salary increases, a similar level to last year.

Level of increase/ decrease	Support	Practitioner	Manager	Director/ Head of	Total % 2019	Total % 2018
1-5%	35%	43%	44%	45%	43%	41%
6-10%	9%	14%	14%	14%	13%	10%
11%+	9%	7%	6%	9%	7%	10%
No increase	30%	22%	25%	25%	25%	29%
Decreased	1%	1%	1%	2%	1%	1%
N/A	17%	13%	11%	6%	10%	9%

5. salaries and benefits

Key benefits

Mobile phone, bonuses and contributory pensions continue to be the top 3 benefits given to respondents. Benefit levels remain much as last year with small increases in those getting flexible hours and car allowances, both up 2%. Non contributory pensions continued to decline.

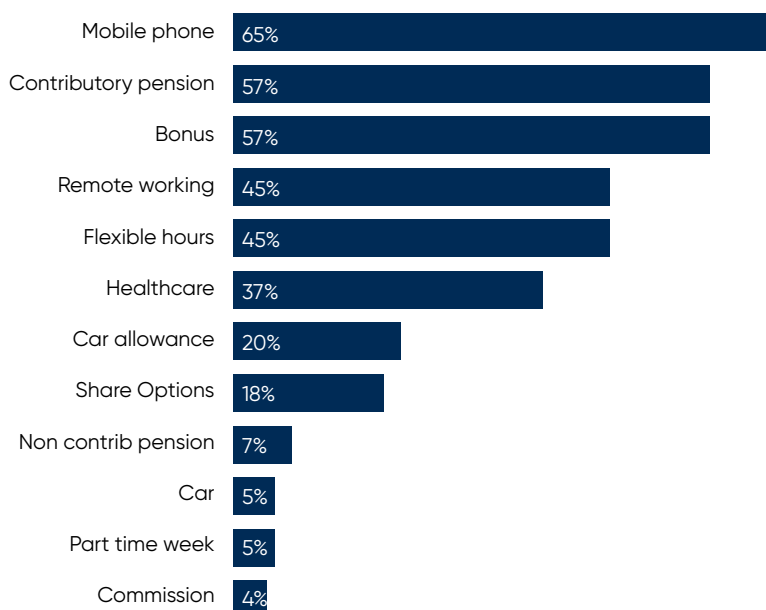
This year for the first time we tracked different types of flexible ways of working, to differentiate between remote working, flexible hours and part time working (eg 3 or 4 day week). We are increasingly hearing from candidates that they want more flexible options, driven to a great degree by long commutes, improved technology and expectations around a better work life balance.

As we saw in previous years multinationals offer considerably more benefits across the board than Irish owned companies and smaller companies, particularly in terms of bonuses, contributory pensions, remote working, flexible hours, healthcare, share options and car allowances.

As recorded last year, **male respondents** continue to have a higher level of benefits vs female respondents across all categories, except part time working.

The benefit differential between male and female respondents is highest for cars and car allowances, remote working, bonuses and share options. For the first year we see that male respondents also get more access to flexible hours than females, despite perceptions of flexible hours being a female benefit.

% of respondents receiving benefit



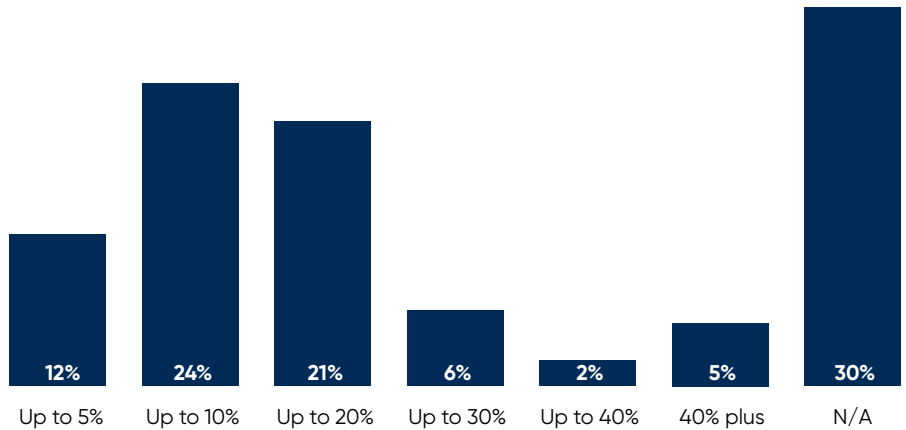
BENEFITS	Mobile phone	Bonus	Contrib pension	Remote work-ing	Flex hours	Health-care	Car allow-ance	Share options	Non contrib pension	Car	Part time wk	Com-mission	No bene-fits
Irish owned	62%	47%	50%	38%	42%	19%	16%	10%	8%	5%	5%	4%	11%
Multinational	70%	72%	69%	54%	49%	62%	27%	28%	6%	6%	3%	3%	5%
1 to 50 employees	55%	43%	33%	40%	42%	23%	14%	11%	7%	6%	7%	6%	16%
51-200	65%	54%	56%	39%	41%	38%	19%	12%	7%	7%	5%	4%	10%
201-500	71%	65%	62%	45%	41%	50%	19%	19%	11%	4%	4%	4%	7%
500+	70%	66%	75%	52%	51%	42%	26%	25%	6%	4%	2%	2%	4%
Male	65%	60%	58%	50%	47%	39%	26%	21%	9%	10%	1%	6%	8%
Female	65%	56%	58%	42%	44%	36%	17%	16%	6%	3%	7%	2%	9%
All	65%	57%	57%	45%	45%	37%	20%	18%	7%	5%	5%	4%	9%

5. salaries and benefits

Bonuses

There are significantly more respondents this year, across all career levels, that get a bonus as a benefit. 70% of all respondents have a bonus component in their package, vs just 59% last year. Half get a bonus of up to 10% of salary.

As we saw last year, bonuses also increase in scale, in line with career seniority.

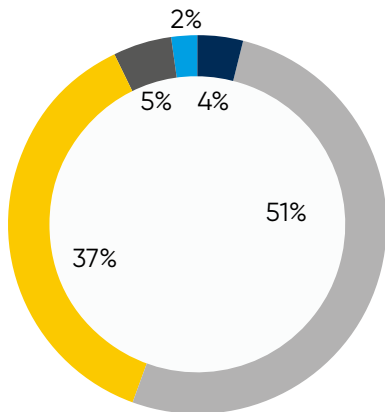


- 80% (vs 75% last year) of directors/heads of get a bonus. 46% get bonuses of up to 10-30% of their salary vs a survey average of 27%.
- 74% of managers get bonuses (vs 65% last year). 54% of all manager level respondents get in the 5-20% range.
- 65% of practitioners get bonuses (vs 56% last year), mostly in the up to 10% range. 35% get no bonus.
- 44% of executive/support level get a bonus (vs 35% last year), mostly in the 1-10% range. 56% get no bonus.

Annual leave

Annual leave entitlement is broadly unchanged vs the last two years.

88% of all respondents get 20-29 days leave. 51% have 20-24 days vs 52% last year. 37% have leave allowance of 25-29 days vs 36% last year.



Up to 19 days 20 -24 days
 25 -29 days +30 days
 35+ days

Career level is the key determinant in annual leave. Two thirds of support and practitioner level respondents get 20-24 days, broadly unchanged vs last year. 64% of Head of/Directors get 25 + days leave, up on 60% last year.

	0 - 19 Days	20 - 24 Days	25 - 29 Days	30 - 34 Days	35 - Days plus
Support	15%	68%	15%	1%	1%
Practitioner	3%	65%	28%	3%	2%
Manager	3%	54%	35%	7%	1%
Head of/ Director	3%	33%	54%	7%	3%
ALL	4%	51%	37%	5%	2%

As last year, larger companies offer better leave. 57% respondents in Irish owned companies get 20-25 days leave on average compared to 44% of multinationals. 46% of respondents in multinationals get leave of 25-29 days vs 31% of those in Irish owned companies.

Those working in government (81%), financial services, gaming, education, telco, pharma & OTC, travel/airlines, drinks and professional services (48%) sectors, have the highest levels of annual leave (25 days or more), versus the survey average of 44%.

5. salaries and benefits

Here we look in detail at salaries and key benefits by role and by career level.

We present a minimum and maximum salary range for each, as well as the survey average, excluding any significant outliers. We also provide the Alternatives View of salaries, based on our experience of roles briefed to us.

Directors & heads of level

One third of our survey respondents this year were at Director or Head of level, as last year. They are the most senior respondents and have significant people, business and budget responsibility.

In gender terms 56% of senior respondents were female, 44% male, much as in previous years. Ours is an industry where females have successfully advanced in number to the most senior management levels.

Key roles at Director level include directors of marketing, CEO's and country managers, commercial directors, sales & marketing directors, senior account directors, business development directors, digital directors and communications directors.

Key roles at Head of level, are Head of marketing & brand, Head of digital, Head of communications, Head of insights & research, Head of strategic planning head and Head of customer experience.

Similar to last year 90% at this level are in **permanent roles**. 3% are on fixed term contracts or are contracting and 5% are consulting. 37% have contracted or freelanced before vs a market average of 33%.

The average salary for Directors this year is €132k vs 123k last year (+7.6%). 80% of director level respondents get paid in the €80-180k range; half get paid €100-150k.

The average salary for Heads of level is €100k vs €95k last year (+5%). 80% of Head of level respondents get paid in the €70-140k range; half get paid €80-110k.

68% received a salary increase this year (up on 64% last year), 25% had no increase.

Annual leave allowances have improved. 33% of respondents at this senior level get 20- 24 days **annual leave**, 54% get 25-29 days and 10% get 30-34 days, up on last year.

Other benefits are somewhat down on those recorded last year. 81% get mobile phones, 68% get bonuses. 63% get contributory pensions; 45% get healthcare, 40% get a car allowance or a car and 27% get share options.

Of those who get bonuses, 18% get up to 10% of salary, an additional 34% get up to 20%, 13% up to 30% and 15% can get 40% or more.

Key KPI's are on revenue targets (45%), profit (39%), customer acquisition (29%) and brand metrics (26%), all of which are similar to last year, but still strike us as low for an industry that needs to keep demonstrating hard business value add.

In terms of security and engagement, senior professionals are relatively secure and engaged in their roles. 75% feel secure or very **secure** in their current role, much as last year (74%) and also feel more secure than the levels below them.

They are also the most engaged of all respondents. 66% rate their personal engagement at 7/10 or above, up from 63% last year and vs a survey average of 59%. Very few are actively disengaged. **The top factors** that **engage** senior professionals beyond salary is as previous years a meaningful role, a great boss and colleagues.

At similar levels to last year, 69% would recommend their employer to a friend vs the survey average of 59%. This increased engagement level halts the declining trend of the last 3 years, which is welcome.

1 in 3 senior professionals expect to be with their current companies for 3+ years, however, despite high engagement, with the buoyant economy **almost 1 in 2 expect to remain with their current company for up to 2 years only**. This may change post Brexit.

39% see their **future career** in marketing. 36% see their future in general management, much as last year, 7% in other senior customer centric roles and 7% in commercial.

Unsurprisingly for those who lead functions and are responsible for performance, respondents at this level are more concerned **about future trading conditions and the impact of Brexit** than those at other levels. 61% expect Brexit to have a negative impact on their businesses, vs a survey average of 50%. Worryingly, given their insight into top level decision making, 59% believe their organisations are not at all prepared or only somewhat prepared for Brexit.

5. salaries and benefits

Director level

with budget and people responsibility e.g. marketing director, chief digital officer

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Account Director – Director level	€75,000	€120,000	€93,333	€80,000–€100,000
CEO/MD/Business Owner– Agency	€40,000	€190,000	€105,500	€90,000–€150,000
CEO/MD/Business Owner –Non agency	€100,000	€250,000	€151,667	€120,000–€200,000
Business Development Director	€95,000	€170,000	€133,333	€90,000–€130,000
CMO/Marketing Director	€80,000	€250,000	€141,302	€120,000–€200,000
Commercial Director	€70,000	€210,000	€120,978	€120,000–€200,000
Communications Director	€85,000	€250,000	€131,667	€120,000–€180,000
CDO/Online Director	€95,000	€180,000	€136,563	€120,000–€200,000
Creative Director	€110,000	€140,000	€125,000	€100,000–€160,000
Product Director	€100,000	€160,000	€121,667	€120,000–€160,000
Sales & Marketing Director	€95,000	€220,000	€149,722	€120,000–€200,000
Senior Consultant	€80,000	€190,000	€126,875	€90,000–€180,000
Director Level Average			€132,015	

Head of level

With budget and people responsibility e.g. Head of marketing, Head of digital

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Account Director – Head of level	€50,000	€110,000	€77,778	€55,000–€80,000
Brand Head of	€65,000	€160,000	€106,406	€90,000–€120,000
Communications Head of	€60,000	€120,000	€91,136	€90,000–€120,000
Customer Experience Head of	€55,000	€160,000	€109,000	€100,000–€140,000
Data Analytics – Head of	€95,000	€120,000	€106,250	€100,000–€140,000
Digital/Online Head of	€65,000	€190,000	€109,000	€100,000–€120,000
E-Commerce Head of	€100,000	€120,000	€110,000	€100,000–€140,000
Innovation Head of/Dir	€100,000	€140,000	€120,000	€120,000–€180,000
Insights Head	€70,000	€170,000	€116,875	€90,000–€120,000
Marketing Head of	€45,000	€160,000	€94,653	€90,000–€130,000
PR Head of	€70,000	€170,000	€117,500	€90,000–€120,000
Proposition/Segment Head of	€100,000	€110,000	€105,000	€100,000–€140,000
Research Head of	€80,000	€130,000	€103,333	€80,000–€110,000
Sales/Commercial Head of	€95,000	€110,000	€99,375	€90,000–€100,000
Sponsorship Head of	€65,000	€100,000	€82,500	€90,000–€110,000
Strategic Planning Head of	€70,000	€150,000	€99,500	€85,000–€120,000
Transformation Head of/Dir	€120,000	€170,000	€145,000	€120,000–€180,000
Director Level Average			€100,205	

Note

- **Survey min/max:** Denotes minimum and maximum salary levels recorded in the survey. Bear in mind there are a wide range of salaries for the same role in some cases, with company size and other factors often influencers of same. In rare cases an extreme outlier has been excluded.
- **Survey average:** The average salaries of all respondents, by role.
- **Alternatives View:** Alternatives opinion on the salary range by role, based on actual roles briefed into it and on open market tracking.

5. salaries and benefits

Manager level

Managers are classed as those with typically 9-10 years' plus experience, with some people & budget responsibility.

Most frequently cited roles at this level are marketing managers, account directors & managers, communications managers, digital managers, insights & research managers, business development managers, sales & marketing managers, senior/brand managers, strategic planning managers, sales manager and data/advanced analytics managers.

In terms of **gender**, two thirds of manager level survey respondents are female and there is a 2:1 ratio of females to males at this level highlighting how this industry is becoming increasingly female.

89% are employed on permanent contracts, 6% on a fixed term contract and 3% on interim contracts. 37% have contracted or freelanced before.

The average salary for Managers this year is €70k vs 68k last year (+3.5%). 80% of manager level respondents get paid in the €50-90k range; half get paid €60-80k.

Ranges are broad and there are significant differences in salaries between small and larger companies. An average marketing manager's salary in a small Irish owned company is €55k, whereas in a large company it averages €77k.

64% of managers got an increase in salary in the last year, 44% getting an increase of up to 5%.

The top benefits enjoyed by managers are much as last year: mobile phones (74%), contributory pensions (61%), bonuses (60%). Remote working is available to 51% of managers and flexible hours to 49%. 6% work a part time week. This reflects what we are seeing in the market—a real desire for forms

of flexible working and employers increasing provision of same. Healthcare is provided to 36% of managers.

As last year, 54% of managers get 20-24 days annual leave and 35% get 25-29 days. 7% get 30-34 days.

The top 3 factors that **engage them** beyond salary are a meaningful role (50%) a great boss (42%) and flexible hours (37%). The ability to work remotely is also motivating for this cohort.

69% of managers feel secure or very **secure** in their roles, down somewhat from 72% last year. However only 58% (57% last year) rate their **personal engagement** in their role and company at 7/10 or above. 14% rate themselves as actively disengaged (1-3 out of 10 rating) and only 56% would recommend their employer to a friend (down from 58% last year).

51% of managers expect to remain in their current company for only one to two years. Despite this high level, it at least marks an improvement vs the previous years, when 60% said they would leave within the next two years. 31% plan to stay for more than three years, up on last year when only a quarter expected to do so.

52% see their **future careers** in marketing, 15% see their future in general management, 11% in other customer oriented roles and 8% in digital.

5. salaries and benefits

Manager level

Typically with some budget and people responsibility e.g. Marketing Manager

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Account Mgr/Dir-Manager level	€40,000	€80,000	€63,382	€45,000–€70,000
Base Manager	€40,000	€75,000	€53,750	€65,000–€85,000
Brand Manager	€45,000	€80,000	€61,500	€45,000–€70,000
Business Development Manager	€35,000	€110,000	€68,125	€55,000–€80,000
Campaign Manager	€60,000	€80,000	€69,167	€50,000–€70,000
Category Manager	€55,000	€80,000	€67,500	€65,000–€85,000
Communications Manager	€40,000	€90,000	€65,938	€60,000–€90,000
Consultant - Manager level	€40,000	€90,000	€70,000	€75,000–€110,000
Customer Experience Manager	€50,000	€80,000	€65,000	€55,000–€80,000
Data/Advanced Analytics Manager	€65,000	€100,000	€88,500	€80,000–€100,000
Digital/Online Manager	€45,000	€90,000	€68,690	€55,000–€80,000
E-Commerce Manager	€65,000	€100,000	€83,500	€80,000–€120,000
Events Manager	€40,000	€70,000	€58,333	€35,000–€70,000
Innovation Manager	€65,000	€85,000	€75,833	€70,000–€90,000
Insights Manager	€60,000	€110,000	€77,639	€65,000–€90,000
Internal Communications Manager	€85,000	€110,000	€96,250	€65,000–€90,000
Loyalty Manager	€80,000	€120,000	€97,500	€75,000–€110,000
Marketing Effectiveness Manager	€65,000	€130,000	€86,667	€80,000–€100,000
Marketing Manager	€40,000	€120,000	€67,070	€50,000–€90,000
Media Manager	€55,000	€120,000	€88,125	€55,000–€70,000
PR Manager	€45,000	€75,000	€59,500	€55,000–€80,000
Product Manager	€70,000	€130,000	€102,500	€70,000–€100,000
Programme Manager	€55,000	€90,000	€68,500	€60,000–€90,000
Proposition/Segment Manager	€80,000	€100,000	€87,500	€70,000–€95,000
Research Manager	€45,000	€80,000	€60,500	€55,000–€85,000
Sales & Marketing Manager	€40,000	€75,000	€56,389	€50,000–€90,000
Sales/Commercial Manager	€50,000	€90,000	€72,500	€50,000–€90,000
Senior Brand Manager	€65,000	€100,000	€79,500	€60,000–€90,000
Sponsorship Manager	€50,000	€80,000	€71,250	€65,000–€85,000
Strategic Planning Manager	€60,000	€100,000	€80,000	€55,000–€80,000
Manager Level Average			€69,910	

Note

- **Survey min/max:** Denotes minimum and maximum salary levels recorded in the survey. Bear in mind there are a wide range of salaries for the same role in some cases, with company size and other factors often influencers of same. In rare cases an extreme outlier has been excluded.
- **Survey average:** The average salaries of all respondents, by role.
- **Alternatives View:** Alternatives opinion on the salary range by role, based on actual roles briefed into it and on open market tracking.

5. salaries and benefits

Practitioner level

Practitioners are defined as those at an early to mid-career stage, with typically 5 to 9 years' experience.

69% of respondents at this level are female this year (vs 74% last year). There are 2.2 females to every male at practitioner level. The industry needs to consider how to attract more males to ensure a more gender balanced function.

Most frequent roles at this level are brand managers, senior marketing executives or managers, account managers, communications managers, project managers, digital managers & executives, Content, social media & community managers, graphic designers, product managers, research managers and data scientists & analysts.

88% are in full-time employment, on permanent contracts, up from 82% last year. 8% are on fixed

term contracts and 2% on interim assignments. 31% have contracted or freelanced before.

The average salary for practitioners this year is €51k vs 49k last year (+3.4%). 80% of practitioner level respondents get paid in the €40-80k range; half get paid €45-75k.

64% got a salary increase last year reflecting the high demand in the market for professionals at this career stage.

These respondents are more likely than average to work for multinational companies (49% vs a survey average of 42%).

The key benefits practitioner level respondents receive are contributory pensions (55%), bonuses (51%) and mobile phones (48%). Flexible working is up. 44% can work remotely (up on last 40% LY) and 43% have flexible hours (up on 39% LY). 36% get healthcare.

65% of respondents get 20-24 days annual

leave. 28% get 25-29 days.

The top 3 factors that engage them most at this career stage, other than salary, are as last year, career progression opportunities, flexible hours and a meaningful role. **However a lack of engagement remains a key issue at this level.**

Only 50% rate their **personal engagement** in their company or role at 7/10 or higher, although this is still an improvement on last year when it was just 45%. 22% are actively disengaged, rating their engagement level as 3 or less out of 10, a continued decline vs last year when it was 20%. 7% rate themselves at an engagement level of just 1 out of 10. Only one in two would recommend their employer to a friend.

70% feel secure or very secure in their jobs, up from 63% last year. That said, 61% do not expect to remain in their current company beyond two years. They see their **future careers** in marketing (56%), in other customer focused roles (9%), in digital roles (9%) and general management (8%).

practitioner level

5 to 9 years' experience typically with minimal team management e.g. Brand Manager, Product Manager

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Account Manager	€30,000	€70,000	€49,853	€40,000-€55,000
Brand Manager	€35,000	€75,000	€51,667	€40,000-€60,000
Campaign Manager	€40,000	€65,000	€50,000	€45,000-€65,000
Category Manager	€55,000	€65,000	€58,750	€40,000-€70,000
Communications Manager	€30,000	€85,000	€55,682	€50,000-€70,000
Consultant - Practitioner level	€25,000	€65,000	€48,125	€30,000-€60,000
Content Manager	€45,000	€65,000	€54,167	€40,000-€60,000
Copywriter	€35,000	€55,000	€45,833	€45,000-€65,000
CRM Manager	€50,000	€70,000	€59,167	€45,000-€65,000
Customer Experience Manager	€50,000	€55,000	€52,500	€45,000-€65,000
Data Analyst/Digital Data Analyst	€35,000	€50,000	€43,500	€45,000-€60,000
Data Scientist	€30,000	€85,000	€61,250	€50,000-€75,000
Data Scientist Senior	€80,000	€110,000	€95,000	€75,000-€100,000
Digital/Online Manager	€25,000	€70,000	€50,500	€40,000-€65,000
Events Manager	€25,000	€55,000	€40,000	€30,000-€50,000
Graphic Designer	€30,000	€55,000	€39,167	€35,000-€55,000
Marketing Executive Senior	€25,000	€65,000	€43,750	€35,000-€45,000
Marketing Manager	€40,000	€75,000	€61,000	€45,000-€65,000
Product Manager	€35,000	€60,000	€47,500	€45,000-€70,000
Programme Manager	€45,000	€55,000	€50,000	€45,000-€60,000
Project Manager	€35,000	€70,000	€50,500	€40,000-€60,000
Research Manager	€35,000	€70,000	€49,167	€45,000-€65,000
Sales & Marketing Manager	€35,000	€55,000	€44,167	€35,000-€50,000
SEO/SEM/PPC Specialist	€45,000	€65,000	€55,000	€40,000-€60,000
Social Media/Community Manager	€40,000	€65,000	€50,833	€45,000-€65,000
Practitioner Level Average			€50,777	

5. salaries and benefits

Executive - support level

Executive/support level respondents typically have 1-4 years' experience and are at early career stage. **Most frequent roles** at this level include marketing executives & assistants, digital executives, account manager & executives, assistant brand managers, campaign executives, graphic designers and data analysts.

The **gender split** of respondents at this early career stage is 69% female to 31% male. Although proportionally less female than last year (75% female), the outlook will continue to be a female skewed industry unless we can attract and retain more males at early career stage.

More are now on permanent or fixed term contracts, possibly due to the high level of competition for people at this level. 80% are on permanent contracts, up from 74% last year and 15% are on fixed term contracts. 27% have contracted or freelanced before.

The average salary for support level respondents this year is €34k vs €30k last year (+12.5%), this high increase reflecting the very competitive marketplace for professionals at this career stage. 80% of support level respondents

get paid in the €25-50k range; half get paid €30-45k.

53% got a salary increase in the last year and we see that starting salaries for those in first or second jobs are higher than in previous years.

Benefits are similar to last year. The **top three benefits** support/executive level employees receive are contributory pensions (38% - up on 34% last year), bonuses (31%) and flexible hours (27%).

The top factors that **engage beyond salary at this level**, is working with great colleagues (48%), career progression opportunities (47%) and having a great boss (45%). They also value a nice office more than other levels.

68% get 20-24 days annual leave and 15% get 25-29 days.

However, **personal engagement** remains low and is a key issue to address. Only 48% rate themselves at an engagement level of 7 out of 10 or more, vs the survey average of 59%. 16% are actively disengaged (3 out of 10 or less), although this is a slight improvement on last

year when it was 19%.

In addition, **only 48% would recommend their employer** to a friend. A significant one in five would not. 70% do not expect to remain in their current company for more than two years, although this is an improvement on last year when 80% of respondents at this level expected to leave within two years. This continues to reflect the high demand and variety of roles available to early stage career executives, with both Irish owned companies and multinationals. It also may reflect why 63% feel **secure** in their current roles.

58% see their **future careers** in marketing. 16% see their future in digital and 8% in other customer focused roles such as data analytics, CEX, product management. Just 3% see themselves in general management roles in the future and 11% don't know.

This cohort are the most optimistic about **future trading conditions**. 84% expect trading to improve or stay the same compared to 70% of the most senior professionals.

support level

First to second role in career -1 to 4 years' experience typically e.g. Marketing Executive

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Account Executive	€20,000	€40,000	€29,038	€28,000-€35,000
Assistant Brand Manager	€30,000	€50,000	€38,750	€35,000-€45,000
Campaign Executive	€20,000	€50,000	€35,833	€30,000-€40,000
Communications Executive	€30,000	€45,000	€35,000	€30,000-€45,000
Content Manager	€30,000	€45,000	€37,500	€30,000-€40,000
Copywriter	€25,000	€45,000	€35,000	€28,000-€40,000
CRM Manager	€25,000	€45,000	€35,000	€30,000-€45,000
Data Analyst / Digital Data Analyst	€25,000	€55,000	€39,167	€35,000-€45,000
Digital / Online Executive	€20,000	€45,000	€35,000	€30,000-€45,000
Events Manager	€25,000	€45,000	€35,000	€28,000-€40,000
Graphic Designer / Designer	€20,000	€45,000	€31,250	€25,000-€35,000
Marketing Assistant	€20,000	€50,000	€35,000	€28,000-€35,000
Marketing Executive	€20,000	€55,000	€32,344	€30,000-€40,000
Marketing Executive Senior	€30,000	€55,000	€42,500	€35,000-€45,000
Project Manager	€20,000	€40,000	€30,000	€35,000-€40,000
Research Executive	€25,000	€65,000	€45,000	€30,000-€40,000
Sales & Marketing Executive	€20,000	€35,000	€27,500	€30,000-€40,000
Support Level Average			€33,542	

generation flex

Flexible working – the new norm

Global reports show that 75% of the global workforce consider flexible working to be the new norm. Remote working, part-time working, job-sharing, working unconventional hours or on contracts, all are part of the significant cultural shift from the traditional, full-time nine to five. 62% of employers have a flexible workplace policy and over 50% of the global workforce work flexibly in practice.

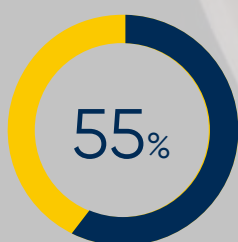
Professionals at all life stages, in particular millennials, now see their careers very differently. They value life experiences more than being tied down to one organisation. They want to have more control and work on the things they really care about. They value results output rather than hours input. The world of technology of course has facilitated this.

Flexibility-in working conditions and in how we access talent-is at the core of the future workplace.

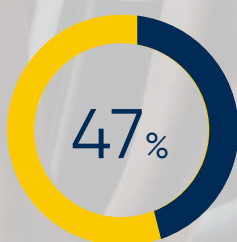
The Irish market continues to trend this way. 216,000 people work on a flexible basis and these numbers will continue to rise. Our survey shows that Ireland reflects global developments and 75% of respondents have the opportunity to work flexibly in some capacity. 55% can work remotely, 47% have flexible hours and more flexibility is offered the more senior the respondent in their career. Telco, drinks, financial services, tech, healthcare and professional services are the sectors most likely to offer flexible options.

And it's a big driver of engagement for employees. Flexible working—in particular flexible hours—is one of the top 4 factors of engagement for employees at all career levels and is a top priority for candidates when looking for a new role.

Does your company offer you flexible working options?



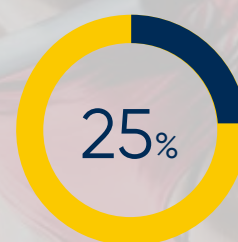
Remote Working



Flexible Hours



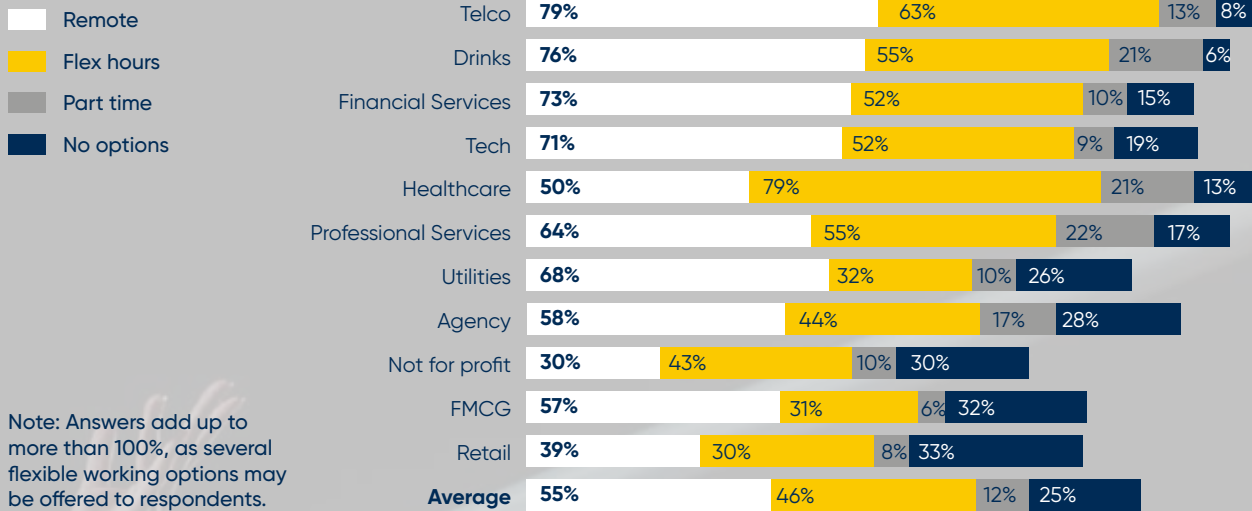
Part time working



No

generation flex

Flexible working options by key sectors



Flexible talent for success

From a client perspective 70% of respondents across a wide range of industries, are accessing flexible talent, such as contractors and interim managers. Those sectors who use flexible talent a lot include utilities, retail, government, media, agencies, tech and financial services. The most in demand skills within the marketing and digital function are predominantly across strategy and planning, brand, digital and transformation, innovation, CX and data analytics.

% of those using flexible talent a lot/sometimes.



33%

of respondents have contracted or freelanced before.

Accessing flexible talent enables clients compete with agility and cost effectively, tap quickly into a wider and diverse talent pool for specialist skills and fresh thinking. From the contractor's perspective it can offer flexibility, allow them to work on diverse projects they love and to live life on their terms.

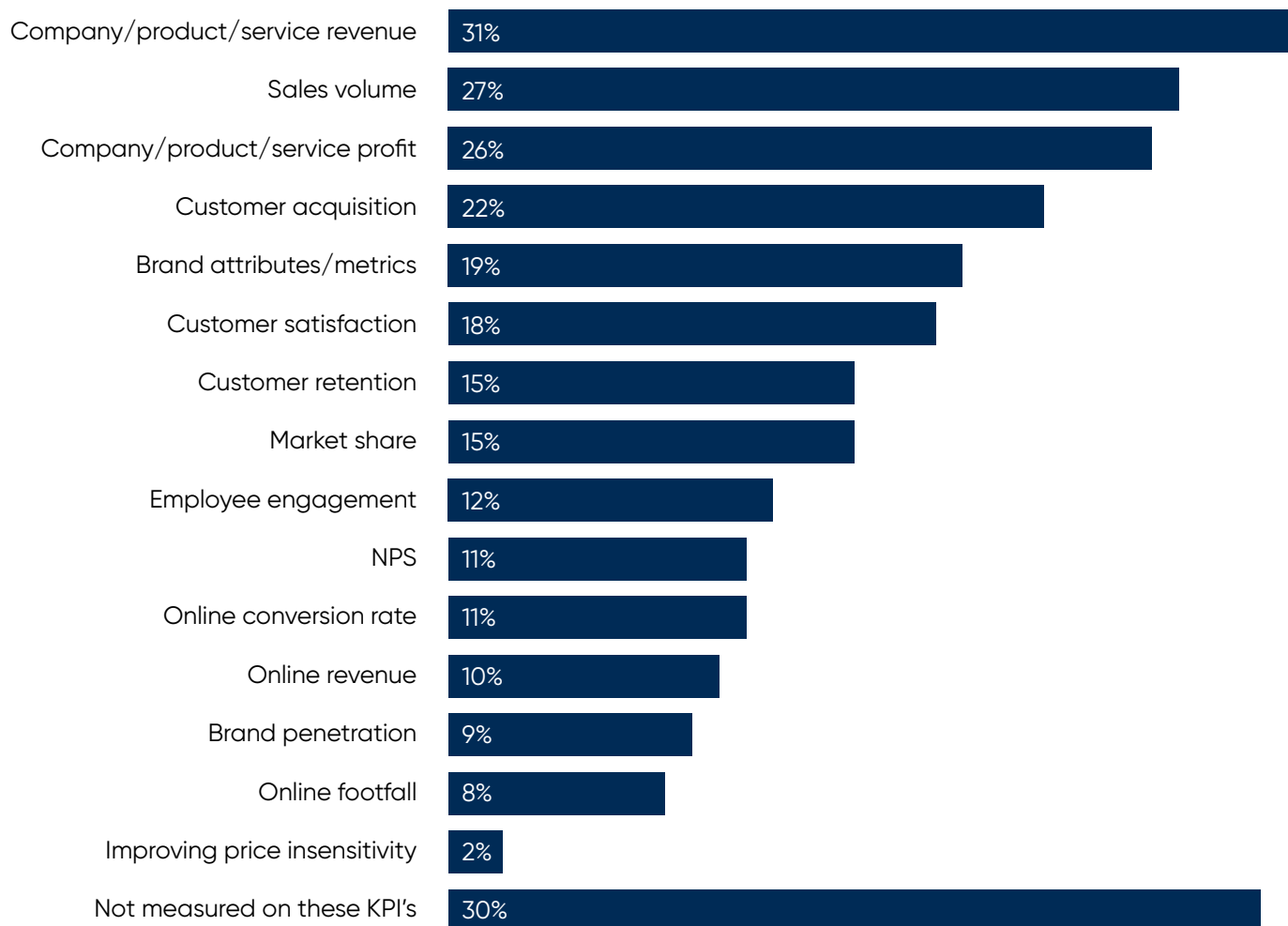
Are you ready to get flexible?

5. salaries and benefits

Key performance indicators (KPI's)

Respondents have a broad range of KPI's.

Top 3 key performance indicators



The top three KPI's are the same as those in previous years—namely revenue, volume and profit. Brand metrics, NPS scores, online revenue and online conversion increased marginally vs last year.

30% of the survey total and almost half of all support and practitioner level respondents are not measured on any of the above metrics, a missed opportunity to ensure results driven, business aligned employees. 83% of directors/Head of level and 72% of managers are measured on the above.

Respondents in Irish owned companies are less likely than multinationals to have these KPI's. Those working in government organisations, not for profit, media & publishing, healthcare and agencies are less likely to have these KPI's.

6. engagement, security and future

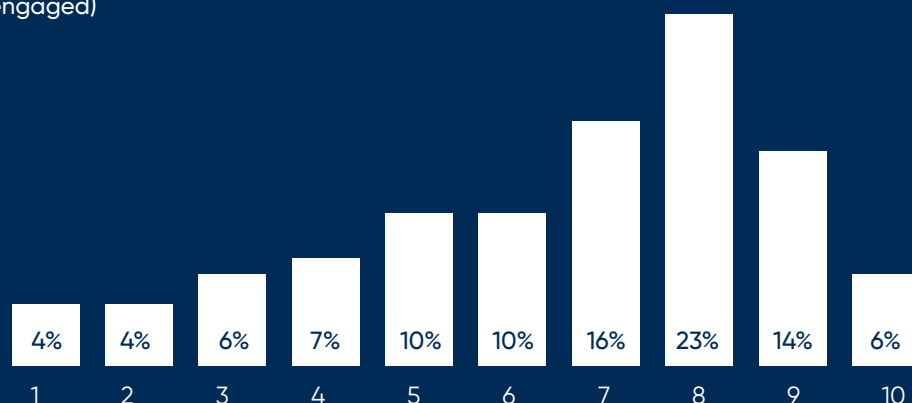
Level of personal engagement

Level of personal engagement in current role & company on a scale of 1-10

(Where 1 is least engaged and 10 is highly engaged)

Levels of engagement are up in general vs last year, halting the downward trend in engagement of the last three years.

59% of respondents this year rated themselves as personally engaged (7 or higher out of 10), up on 56% last year. Directors and heads of remain most engaged, with 66% rating themselves at 7 or higher (vs 63% last year).



However there remain significant levels of disengagement. More than one in five of all respondents still rate themselves at 4 out of 10 or less and this increases the more junior the respondents. 29% of all practitioner level respondents and 27% of support level rate themselves as 4 or less out of 10, despite higher full time employment, salaries and benefits.

	Danger		Mid		Engaged	
	1 to 2	3 to 4	5 to 6	7 to 8	9 to 10	
Support	9%	18%	25%	32%	16%	
Practitioner	15%	14%	20%	37%	13%	
Manager	7%	14%	21%	43%	15%	
Head of/ Director	5%	11%	19%	37%	28%	
All	8%	13%	20%	39%	20%	

As last year, male respondents are significantly more engaged than their female counterparts. 65% rate their engagement at 7 or higher (vs 60% last year), compared to only 55% of female respondents (vs 53% last year), but it is positive to note that engagement levels increased for both.

Engagement factors

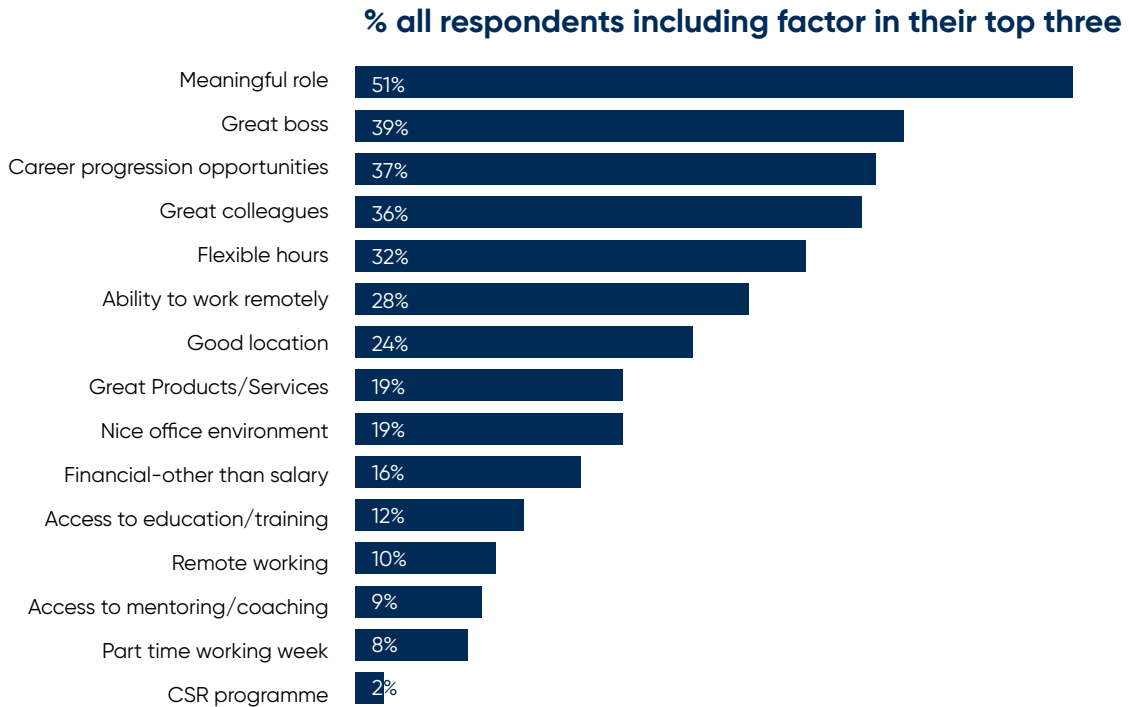
As in previous years respondents want a meaningful role. The people dimension is also critical. They want to work with a great boss and/or colleagues and they want a job that offers them strong career progression opportunities.

Flexibility continues to feature strongly. This coupled with location, as commuting times increase, are likely to remain top engagement factors.

	SUPPORT	PRACTITIONER	MANAGER	DIRECTOR
Engagement Factor 1	Great colleagues	Career progression	Meaningful role	Meaningful role
Engagement Factor 2	Career progression	Flexible hours	Great boss	Great boss
Engagement Factor 3	Great boss	Meaningful role	Flexible hours	Great colleagues
Engagement Factor 4	Nice office environment	Great boss	Career progression	Career progression
Engagement Factor 5	Location/Flexible hours	Ability to work remotely	Great colleagues	Great Products/Services

6. engagement, security and future

The top 3 factors that engage you personally, beyond salary

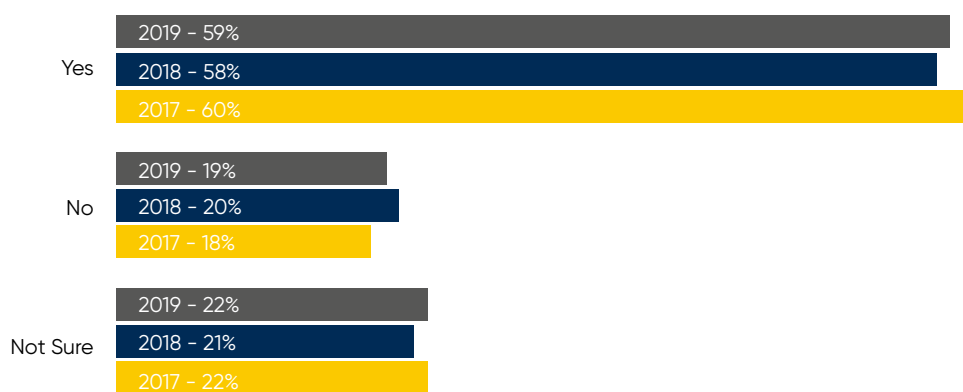


Would you recommend your current employer to a friend?

Only 59% of respondents would recommend their company to a friend, broadly unchanged from 58% last year. Only 48% of support level respondents would recommend their company to a friend vs 69% of directors/heads of.

Males are significantly more likely to recommend their company. 66% would do so vs just 55% of females.

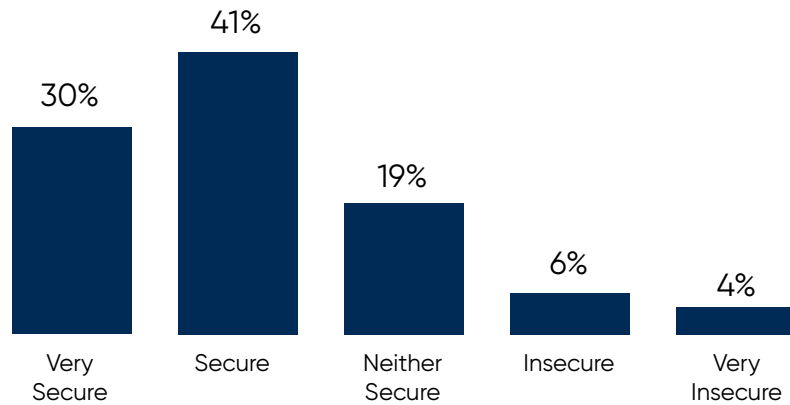
This remains a critical area for organisations to understand and address, particularly in such a competitive market for talent.



6. engagement, security and future

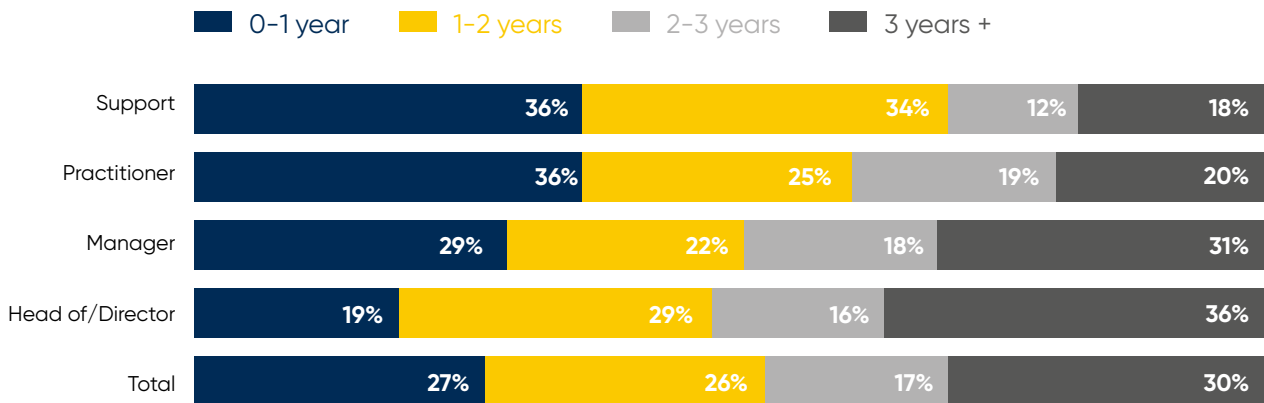
Security in your current role

71% of respondents remain secure or very secure in their roles. Directors/Head of level feel most secure (75%); support level respondents feel the least secure at 63%.



Future in role

How long do you expect to remain in your current company?



The increase in engagement, albeit modest, is reflected in the length of time respondents expect to stay with their current employers. Last year 60% planned to remain for a maximum of two years only. This year the corresponding figure is 53%, which although high, is a marked improvement. 30% envisage staying 3 years or more, vs just 24% last year.

This is also nuanced by career level. 36% of support and practitioner level respondents plan to leave within one year, facilitated by a highly competitive market at this level.

Females at this level are also, as seen in general engagement scores, less likely than their male counterparts to stay beyond two years (55% vs 51% plan to stay 2 years or less).

6. engagement, security and future

Where do you see your future career?

The industry is attracting in people who see their future in marketing and digital rather than a planned route to general management. Just 3% of support level and 8% of practitioners at this stage in their careers see their future lie in general management at all.

65% of all practitioners and 60% of all managers see their future career in marketing and digital. 43% of Head of/director level respondents see their future in marketing & digital management and 36% in general management roles.

Again this year, significantly more females see their future career in marketing & digital than male respondents (62% total females vs 47% total males) and more males see their future in general management (27%), than their female counterparts (16%).

As last year, males are significantly more likely to see themselves in sales (9%), versus just 2% of female respondents.



Top 3 skills needed to successfully fulfill your remit

The top skills deemed important by respondents for them and their teams to be successful in their roles are as follows:



The key skills deemed by respondents to be important to success remain much the same as last year, with the exception of marketing effectiveness, which was a new addition to the survey this year and which came in as the second most important skill set required.

It demonstrates the need and the pressure marketers are under to demonstrate their impact and ROMI clearly to their organisations and boards.

There is also continued recognition of the need to build more strategic skills to ensure marketing in organisations is considered an important strategic partner in driving business success.

Deep strategic planning, digital strategy and data driven insights skills continue to be critical to success. Lead generation, project management and loyalty and retention are also considered important skills to build.

7. the gender dimension

Careers: the male/female dimension

In this section we look at the differences if any, in roles, salaries, benefits and engagement by gender. Last year, despite females dominating the industry, we saw significant differentials in male vs female rewards and engagement and this theme continues.

There are proportionally, and in number, more females than males at all career levels in the marketing/digital/customer focused function.

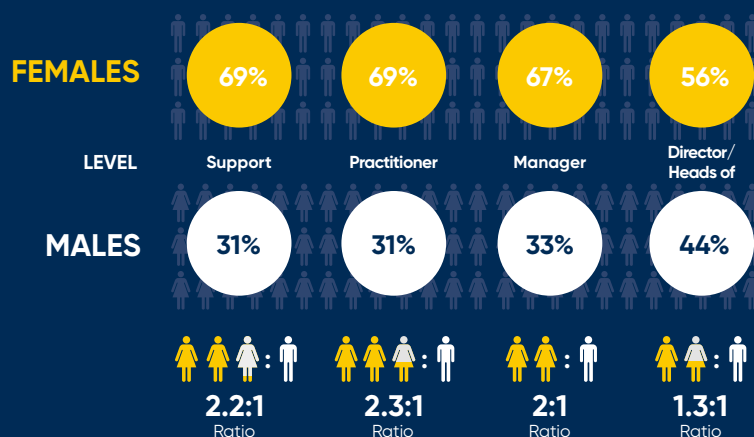
Females are most likely to be in general marketing management roles of all levels, up to director level. Proportionately they are more likely than males to be in brand roles, in agency account management roles, in communications and in strategic planning and insights roles.

Male respondents are most likely to be in senior marketing management roles and in digital roles. They are proportionally more likely to be in commercial/sales roles of all levels, in business development director roles and in data analytics roles.

The ratio of females to males is greatest at early career stage and narrows at the most senior level. Overall there are 1.8 females for every male, down from 2.1:1 last year.

Whilst female representation is very positive, it is critical that the function appeals to newcomers of both genders and retains both throughout their careers to ensure a more gender balanced industry.

Female to male ratio at each level



salary average by level

The following table highlights the average salary by level and the differentials between salaries for female and male respondents. Note that the "average salary" is the average of a potentially wide salary range and there can be significant variances in minimum to maximum levels.

	All roles (average)	Female (average)	Male (average)	Male vs Female €	Male vs Female %	Last Year
Total- Director	€132,015	€123,343	€140,893	+€17,550	+14%	+13%
Total - Head of	€100,205	€96,019	€106,544	+€10,525	+11%	+8%
Total - Manager	€69,910	€68,451	€72,963	+€4,512	+7%	+3%
Total - Practitioner	€50,777	€50,578	€51,229	+€650	+1%	+4%
Total - Support	€33,542	€34,015	€32,500	-€1,515	-4%	-8%

Male respondents continue to be paid significantly more on average than females. Although paid 4% less than females at the start of their career, this quickly changes and the more senior the career level, the more the gap increases. This year, despite a public focus on gender remuneration equality in the market, the gap actually increased at Head of and manager levels.

At director level the salary differential increased for male respondents from €14,917 last year to €17,550 this year and at Head of level it increased from €7,709 to €10,525.

Male respondents also got higher salary increases than their female counterparts and more benefits across all benefit categories.

7. the gender dimension

We have selected the most frequent roles of female and male respondents by level, where there were also a high enough number of both female and male respondents to allow us to make like for like comparisons.

Salary average and differential by roles and gender

Role	All roles (average)	Female Salary (average)	Male Salary (average)	Male vs Female €	Male vs Female %
Account Director – Head of level	€77,778	€75,000	€83,333	€8,333	11%
Agency – CEO/MD/Business Owner	€105,500	€91,875	€125,938	€34,063	37%
Brand Head of	€106,406	€98,000	€120,417	€22,417	23%
Business Development Director	€133,333	€122,500	€138,750	€16,250	13%
CEO/MD/Country Mgr/Business Owner	€151,667	€133,571	€159,118	€25,546	19%
Commercial Director	€120,978	€115,625	€123,833	€8,208	7%
Communications Head of	€91,136	€93,333	€88,500	-€4,833	-5%
Digital/Online Director/CDO	€136,563	€130,417	€155,000	€24,583	19%
Digital/Online Head of	€109,000	€100,500	€117,500	€17,000	17%
Insights Head of	€116,875	€89,167	€133,500	€44,333	50%
Marketing Director/CMO	€141,302	€141,935	€140,147	-€1,788	-1%
Marketing Head of	€94,653	€94,202	€95,500	€1,298	1%
Sales & Marketing Director	€149,722	€135,000	€157,083	€22,083	16%
Average Director/Head of Salary	€116,063	€108,452	€125,526	€17,074	+16%
Account Mgr/Dir-Manager level	€63,382	€64,167	€61,500	-€2,667	-4%
Business Development Manager	€68,125	€70,000	€65,500	-€4,500	-6%
Communications Manager	€65,938	€65,962	€65,833	-€128	0%
Consultant – Manager level	€70,000	€67,500	€71,071	€3,571	5%
Data/Advanced Analytics Manager	€88,500	€82,500	€92,500	€10,000	12%
Digital/Online Manager	€68,690	€71,000	€66,591	-€4,409	-6%
E-Commerce Manager	€83,500	€79,167	€90,000	€10,833	14%
Insights Manager	€77,639	€76,667	€79,583	€2,917	4%
Marketing Manager	€67,070	€66,250	€69,583	€3,333	5%
Research Manager	€60,500	€56,250	€77,500	€21,250	38%
Sales & Marketing Manager	€56,389	€58,333	€52,500	-€5,833	-10%
Sales/Commercial Manager	€72,500	€79,167	€68,500	-€10,667	-13%
Senior Brand Manager	€79,500	€77,500	€82,500	€5,000	6%
Strategic Planning Manager	€80,000	€76,500	€97,500	€21,000	27%
Average manager salary	€69,910	€68,451	€72,963	€4,512	+7%
Account Manager	€49,853	€45,833	€59,500	€13,667	30%
Brand Manager	€51,667	€50,000	€60,000	€10,000	20%
Communications Manager	€55,682	€59,643	€48,750	-€10,893	-18%
Consultant – Practitioner level	€48,125	€50,000	€46,250	-€3,750	-8%
Digital/Online Manager	€50,500	€46,875	€65,000	€18,125	39%
Marketing Executive Senior	€43,750	€42,708	€50,000	€7,292	17%
Marketing Manager	€61,000	€60,833	€61,250	€417	1%
Research Manager	€49,167	€56,500	€40,000	-€16,500	-29%
Average practitioner salary	€50,777	€50,578	€51,229	€650	+1%
Account Executive	€29,038	€28,611	€30,000	€1,389	5%
Consultant	€40,000	€35,000	€45,000	€10,000	29%
Digital/Online Executive	€35,000	€34,643	€35,500	€857	2%
Marketing Assistant	€35,000	€36,250	€30,000	-€6,250	-17%
Marketing Executive	€32,344	€32,611	€31,711	-€901	-3%
Sales & Marketing Executive	€27,500	€32,500	€22,500	-€10,000	-31%
Average support salary	€33,542	€34,015	€32,500	-€1,515	-4%

7. the gender dimension

There are more females than males at every career level but there is an imbalance of salaries, with females being paid less than their male counterparts at most career stages. They still receive less benefits across the board, although the differential has narrowed somewhat versus last year. In general male respondents remain more secure, happy and engaged in their roles than females.



Males 36%

- The ratio of males to females at 1:1.8, although higher than last year, is lowest at the more junior levels (1: 2.2 ratio vs 1:1.3 females at senior level).
- Male respondents are better paid than their female counterparts at all career levels, with the exception of support level (+4%). At €86k they are paid 13% more than the salary survey average of €76.6k.
- Gaps are greatest at Director level and Head of levels.
- 35 male respondents earn €150,000+ salary, versus 22 females, despite there being more female respondents this year at senior level.
- They are most likely to be in senior marketing management and digital roles. They are proportionally more likely to be in commercial/sales and data analytics roles.
- Over half of all male respondents are employed in the financial services, tech, FMCG & drinks and telco sectors as well as in agencies.
- 64% got a salary increase in the last year similar to 63% of females.
- They **get considerably more benefits** than their female counterparts across all benefit categories, even if the gap has somewhat narrowed compared to last year. 60% get a bonus vs 56% of females, 36% vs 20% a car or car allowance, 40% vs 36% healthcare, 21% vs 16% share options, plus others.
- **They are more likely to have the opportunity to earn higher bonuses.** 74% can earn more than 10% of their salary in a bonus, vs 59% of female respondents. 20% can earn 30% or more of their salary compared to just 9% of females. For some it is because of the more commercial/sales nature of their roles, but it also simply reflects the better benefits on offer for males in the industry.
- **They are considerably more engaged and secure in their roles** than females. 65% rate their engagement at 7 or higher, compared to only 55% of females, up from 60% last year. 75% feel secure in their role vs 69% of females. In addition 68% of males would recommend their companies to a friend vs only 55% of females.
- 38% see their future in marketing vs 55% of females. 27% see their future in general management vs only 16% of females and 9% see themselves in commercial roles vs 2% of female respondents.



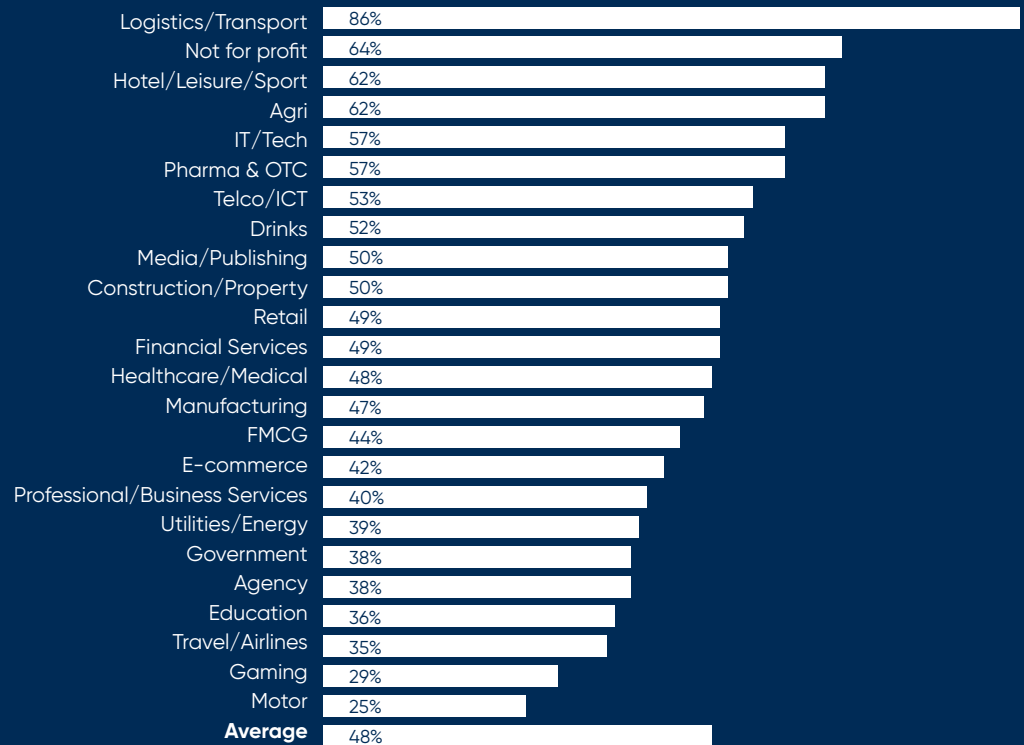
Females 64%

- **There are more females than males at every level**, although the proportion of females to males decreases by level of seniority. The ratio of females to males is greatest at early career stage.
- **There are more female respondents** who are at Head of/Director level than males for the second year running, yet more males were on salaries of €150k+.
- There are proportionally less in permanent roles vs males (86% to 90%) and more in fixed term roles (7% vs 5%).
- They are most likely to be in general marketing management roles of all levels. Proportionately they are more likely than males to be in brand, agency account management, communications and strategic planning and insights roles. Over half work in agencies, tech, financial services, FMCG, professional services and retail sectors.
- **Females get less benefits** than males across almost every benefit category, although the differential between males and females has narrowed this year.
- They get less **annual leave** than their male counterparts. Only 39% of females get 25 days plus annual leave, vs 47% of male respondents.
- Despite female respondents **ranking flexibility** higher as a motivating benefit, in this survey males now have greater access to both remote working (61% of males vs 52% of females) and flexible hours (49% males and 46% females). More females have part time working available to them (15% females to 8% males).
- They remain **less engaged, content and secure in their roles** than their male counterparts.
- They are more likely to be actively disengaged than males (16% vs 10% rating engagement as 3/10 or less) and only 55% of females rate their personal engagement as 7/10 or more compared to 65% of males.
- **Female respondents are more likely to see their future career in marketing** (55% of female respondents, compared to 38% of males) and 16% in general management (vs 27% of males).

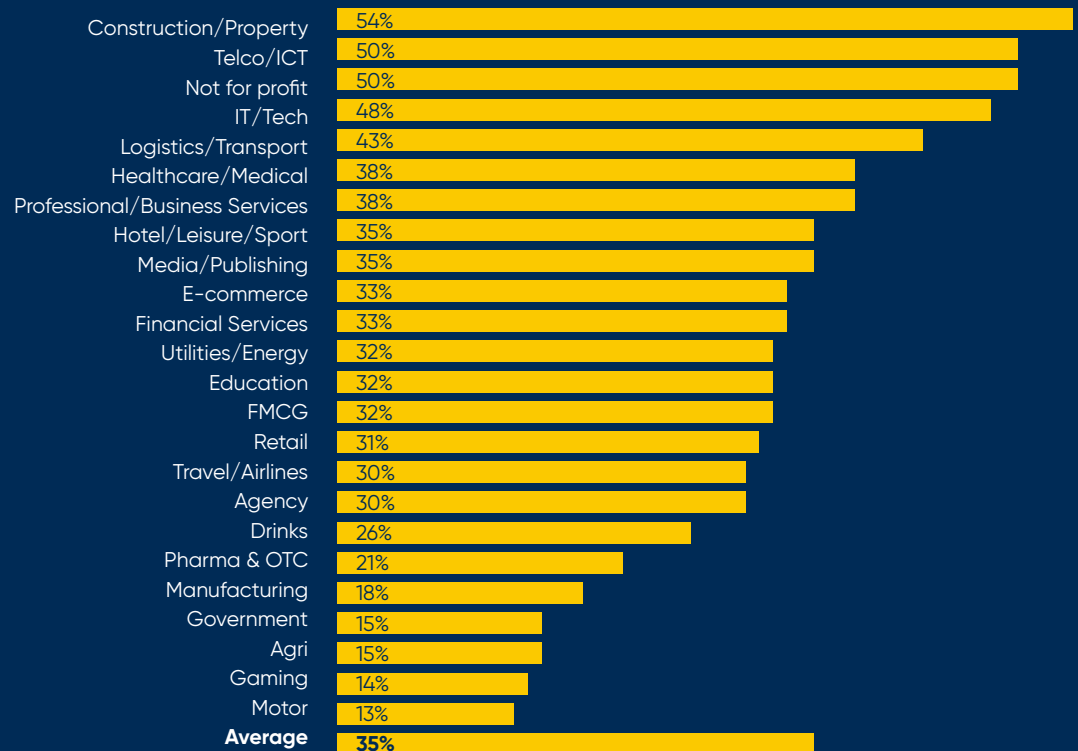


8. sectoral analysis

% who believe customer sentiment in their market improved in last year

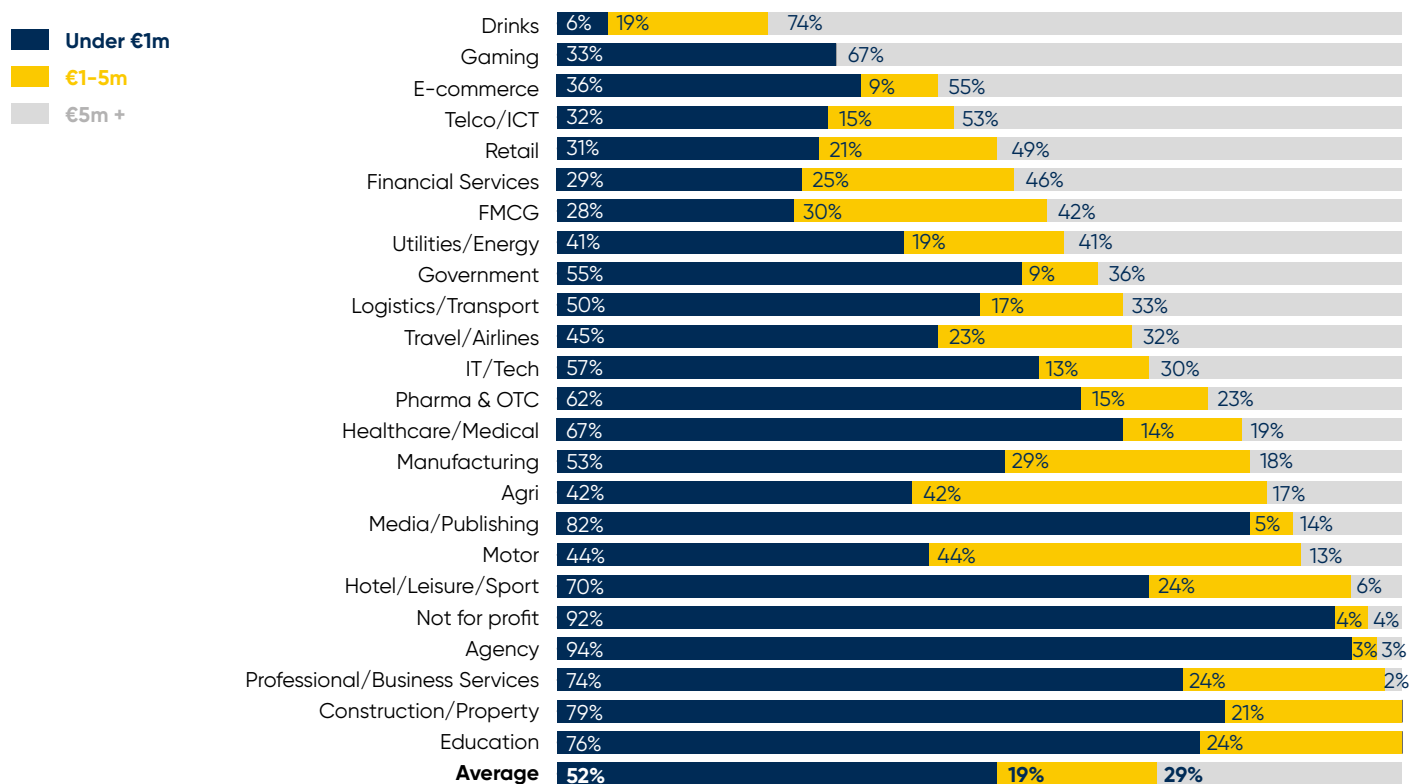


% who expect trading conditions to improve over the next 12 months



8. sectoral analysis

% estimated marketing budgets for 2018-2018 for the year ahead by sector



Top three areas of marketing spend over the next 12 months

	Digital - PPC/SEO	ATL: TV	Sponsorship	Digital - Content & Social Media	Consumer promotions	CRM/Loyalty Programme	Events	ATL: press/ radio/ outdoor	PR	Trade Programmes & Support	Direct Mail/Email Marketing
Agency				2			1		3		
Agri				2			1	3			
Construction/Property				1			2	3			
Drinks		2		1			3				
E-commerce	1			2							3
Education	2			1				3			
Financial Services	1	2	3								
FMCG		2		1	3						
Gaming		3		1		2					
Government		2		1			3				
Healthcare & Medical				2			1		3		
Hotel/Leisure/Sport	2			1				3			
Tech	3			1			2				
Logistics/Transport	1	3						2			
Manufacturing				1			2			3	
Media/Publishing				1			3	2			
Motor	3	2						1			
Not for profit				1			3	2			
Pharma & OTC				1			2		3		
Professional/Business Services				2			1		3		
Retail		1		3				2			
Telco/ICT	2			1				3			
Travel/Airlines	1			2				3			
Utilities/Energy	2	3	1								
Average	3			1			2				

8. sectoral analysis

Agency

Agencies are operating within a highly competitive and evolving marketplace. Classical models are being disrupted. More clients are bringing communications and digital in-house. A lot of spend is being re-directed to the social media giants and media budgets are increasingly being managed directly by the specialist media houses. The big consulting organisations have entered significantly into the marketing services space, with global acquisitions over the last year across all disciplines – from full creative, web design, SEO, production, data and media.

Agencies are fighting back with different remuneration models, many focused on more value based compensation. They are also evolving services in line with client demand. There is an increased focus on integrated communications services, as well as on non-media services such as data, research and strategy consulting. There is also focus on digital specialisms, social media content development and production, as well as on experiential.

Against this backdrop and with Brexit a looming threat, both customer sentiment and future trading outlook, whilst still positive in this year's survey, are somewhat less positive than last year and vs other sectors.

38% felt customer sentiment improved in the last 12 months, lower than the survey average of 48%. 30% feel trading conditions in the next year will deteriorate vs 25% survey average. The sector is the least prepared for Brexit of the survey, with over one in five saying that they are not at all prepared and only 11% feel well prepared vs the survey average of 30%.

With regard to talent, the key challenge for the agency sector is to afford, attract and in particular to retain key agency professionals, who are highly solicited by the tech giants. These offer considerably higher salaries, benefits and more attractive locations than many smaller agency players.

In demand and short supply skills are predominantly across account management, digital, data & analytics, PPC/SEO, programmatic and strategic planning. The market is very competitive for those at support to practitioner level in particular. With an increased focus on customer first services, there is also ongoing demand for those with UX/UI experience, customer experience planning, as well as those with experiential, event management skills. Agencies remain very open to returning and UK talent as many agencies continue to drive overseas growth.

Agency Snapshot

- **67% Irish owned**
- **84% less than 200 employees**
- **Highest female to male ratio**
- **Customer sentiment more negative**
- **Less optimistic about future trading**
- **Mixed views on Brexit**
- **Least levels of preparedness for Brexit**
- **49% got a salary increase**
- **Lower bonuses and general benefits**
- **More likely to get less than 25 days annual leave**
- **Less likely to get flexible working**
- **Engagement somewhat lower than average**
- **94% budgets of less than €1m**
- **Spend focused on events, digital content and PR**

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Account Director – Director level	€75,000	€100,000	€85,833	€80,000–€100,000
Account Director – Head of level	€55,000	€90,000	€74,167	€55,000–€80,000
Account Manager – Senior	€50,000	€80,000	€65,000	€45,000–€70,000
Account Manager	€30,000	€60,000	€45,278	€40,000–€60,000
Account Executive	€20,000	€40,000	€29,500	€28,000–€35,000
Agency – MD /Business Owner	€40,000	€190,000	€105,500	€100,000–€150,000
Business Development Director	€95,000	€140,000	€122,500	€90,000–€130,000
Business Development Manager	€55,000	€70,000	€62,500	€55,000–€80,000
Copywriter	€25,000	€55,000	€41,250	€28,000–€40,000
Digital/Online Executive	€25,000	€30,000	€27,500	€28,000–€40,000
Insights Manager	€60,000	€70,000	€65,000	€60,000–€70,000
Marketing Executive Senior	€30,000	€40,000	€35,000	€35,000–€40,000
Media Manager	€30,000	€60,000	€45,000	€40,000–€60,000
Research Manager	€35,000	€80,000	€53,929	€55,000–€80,000
Strategic Planning Manager	€45,000	€100,000	€72,500	€55,000–€80,000
Strategic Planning Head of	€70,000	€110,000	€85,625	€80,000–€110,000
All roles average-Agency			€72,719	

8. sectoral analysis

Financial Services

In this financial services section we include banking, insurance, fintech. The context is one of change and competition. Technology and disruptive newcomers are shaking up the sector, rethinking the customer experience, business models and channels.

Amongst the key banks there have been changes at C suite, bringing with it a focus on costs and restructuring, a commitment to an increased focus on the customer, an improved banking culture and a better gender balance. In the insurance sector, competition for market share is high and key players are focused on brand building, revenue growth, customer acquisition and on bottom line profitability. Fintech providers are increasingly sophisticated and operating at scale and are also partnering with traditional players here.

Customer sentiment, although a lot lower than last year, was positive for 49% of respondents, on par with other sectors. They are less pessimistic about future trading conditions than other sectors, with 17% anticipating worsening conditions vs 25% survey total.

Brexit remains high on the agenda. 56% feel Brexit will have a negative impact on their business vs 53% average and significant resources have gone into Brexit consulting projects. As a result there is a relatively high level of preparedness for Brexit, with 43% well prepared for Brexit vs a market average of 31%.

The sector continues to be a very attractive sector for talent, despite some hiring freezes in the sector. It attracts professionals from across many sectors, helped by good salaries and benefits, which are in general better than in other sectors and more people in this sector would recommend their employer to a friend (62% vs average of 59%).

There is strong demand for those with data analytics and digital skills and continued demand also for those with proven product, proposition and segment experience. Given the huge emphasis on digital led transformation and innovation, there is demand for senior talent in this area, particularly those who have worked in the UK, USA and Australia where the markets are more mature in terms of digital technologies.

Financial Services Snapshot

- **62% Irish owned**
- **75% more than 500 employees**
- **Relative balance of females to males**
- **Customer sentiment considerably lower than last year (49% vs 71%)**
- **Less positive future outlook than last year, but less negative than average**
- **56% Brexit will have negative impact**
- **Better prepared for Brexit**
- **69% salary increase**
- **More likely to get 25 days plus annual leave**
- **More likely to offer contributory pensions and remote working**
- **Engagement a little above average**
- **Marketing plays more strategic role**
- **KPIs of revenue, brand, acquisition, NPS**
- **46% budgets €5m+**
- **Spend on digital content, TV, sponsorship**

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Brand Head of	€110,000	€120,000	€115,000	€100,000-€120,000
Campaign Manager/Practitioner	€40,000	€50,000	€45,000	€45,000-€65,000
Commercial Director	€100,000	€170,000	€135,000	€120,000-€170,000
Customer Experience Head of	€80,000	€160,000	€117,500	€90,000-€130,000
Digital/Online Manager	€60,000	€85,000	€69,167	€70,000-€80,000
Digital/Online Head of	€80,000	€190,000	€113,438	€100,000-€130,000
Insights Manager	€80,000	€90,000	€85,833	€80,000-€90,000
Insights Head of	€110,000	€170,000	€145,000	€100,000-€130,000
Loyalty Manager	€85,000	€110,000	€96,250	€70,000-€100,000
Marketing Assistant	€20,000	€40,000	€27,500	€30,000-€35,000
Marketing Executive	€30,000	€50,000	€37,500	€35,000-€45,000
Marketing Executive Senior	€30,000	€45,000	€40,000	€40,000-€55,000
Marketing Manager	€45,000	€80,000	€65,000	€60,000-€90,000
Marketing Head of	€75,000	€160,000	€111,000	€100,000-€140,000
Marketing Director/CMO	€110,000	€200,000	€153,000	€140,000-€250,000
Product Manager	€40,000	€100,000	€65,833	€60,000-€100,000
Proposition/Segment Head of	€100,000	€110,000	€105,000	€100,000-€130,000
Social Media/Community Manager	€40,000	€65,000	€52,500	€45,000-€65,000
Strategic Planning Head of	€100,000	€110,000	€105,000	€100,000-€120,000
Transformation Head of	€120,000	€170,000	€145,000	€120,000-€150,000
All roles average-Financial Services			€91,746	

8. sectoral analysis

FMCG & Drinks

This is a significant sector with a dynamic mix of start-ups, large Irish businesses focused on Ireland and UK markets, and multinational players with EMEA and global remits.

It is however a sector under pressure. Customer sentiment was lower than last year and was less positive than sentiment in most other sectors. The outlook for future trading is also considerably worse than other sectors, with 41% of FMCG and 45% of drinks respondents expecting trading conditions to deteriorate, almost double that of the survey average of 25%. 81% of FMCG and 77% of drinks respondents feel they will be negatively impacted by Brexit, considerably higher than the survey average of 53%.

With the ongoing weakening of sterling vs the euro, Irish goods risk losing competitiveness in the UK. Companies are also stockpiling to avoid business disruption. This places pressure on organisations to both manage costs tightly, whilst also trying to innovate and develop other revenue streams and markets with urgency, a difficult balancing act.

Despite the pressures, the sector remains an attractive one in which to work.

Marketing is an important driver of demand and expansion and is considered strategic by 75% in FMCG and 91% in drinks, vs a survey average of 61%. Marketers are more likely to own the P&L on their brands and be responsible for the profit contribution of their brand portfolios. There are interesting challenges in response to key societal concerns regarding health and nutrition, sustainability, traceability and transparency.

With the need to find new revenue streams, there is ongoing demand for innovation professionals—either on full-time or consulting basis—or for those with international experience, strategic planning and insights skills. Organisations continue to invest in those with strong brand management and marketing management skills, particularly at mid-market level. Junior marketers are also highly sought after but in short supply. We are also seeing the emergence of sustainability marketing roles as this becomes a critical board issue.

Personal engagement levels in FMCG are lower than average, with 28% actively disengaged vs 21% total survey, due potentially to the market pressures faced. It also contrasts with those who work in drinks specifically, who are highly engaged.

FMCG Snapshot

- **55% internationally owned**
- **Mixed size companies; 58% 200+ employees**
- **66% female**
- **Customer sentiment worse**
- **Much more negative on future trading**
- **Most negative on Brexit (81% vs average of 53%)**
- **37% well prepared for Brexit**
- **65% 25 days or less annual leave**
- **69% salary increase**
- **Better benefits than average; more likely to get bonuses**
- **Less flexible working**
- **75% marketing in strategic role**
- **KPIs of profit, market share, sales, brand**
- **72% budgets €1m+ vs 47% average**
- **Spend on digital content, TV, promotions**

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Brand Head of	€70,000	€140,000	€103,125	€80,000–€120,000
Brand Manager	€35,000	€80,000	€54,063	€45,000–€70,000
Business Development Manager	€45,000	€110,000	€76,667	€45,000–€85,000
Category Manager	€55,000	€80,000	€63,214	€55,000–€80,000
MD/Country Mgr/Business Owner	€100,000	€250,000	€143,750	€120,000–€250,000
Commercial Director	€95,000	€140,000	€115,000	€100,000–€140,000
Digital/Online Manager	€50,000	€80,000	€65,000	€65,000–€80,000
Innovation Manager	€75,000	€85,000	€80,000	€75,000–€110,000
Insights Manager	€60,000	€85,000	€70,500	€65,000–€85,000
Marketing Executive	€25,000	€40,000	€31,500	€35,000–€45,000
Marketing Executive Senior	€50,000	€60,000	€55,000	€45,000–€55,000
Marketing Manager	€55,000	€110,000	€77,125	€65,000–€85,000
Marketing Head of	€45,000	€160,000	€98,333	€90,000–€150,000
Marketing Director/CMO	€95,000	€180,000	€132,250	€130,000–€200,000
Senior Brand Manager	€45,000	€85,000	€65,833	€55,000–€80,000
All roles average-FMCG			€82,843	

Note: We did not include roles in this sector where respondent numbers were low. Please reference roles in the detailed salary section of this report in Section 5- Salaries & Benefits.

8. sectoral analysis

Professional & Business Services

This sector includes respondents in areas such as consulting, legal, accounting and the big 4. There is a mix of those in Irish and multinationals and over half work in organisations of 200+.

The sector is dynamic, with much growth in particular for the larger players who have been active providing services to government, the burgeoning FDI sector and to financial services players setting up back office operations in Ireland in advance of Brexit. A number of the larger professional services firms have also entered into digital, customer and marketing advisory solutions, having made global and local acquisitions and competing with traditional agencies for business.

As with most sectors, sentiment within the sector is positive, although not as strong as last year. Whilst 82% felt customer sentiment remained the same or was better, only 40% felt it improved, vs 68% who felt it improved in last year's survey.

The outlook for the sector remains strong in spite of Brexit. 79% predict trading conditions will improve or stay the same in the year ahead vs a survey average of 75%. They feel less negative about the impact of Brexit than other sectors. 39% predict some negative impact vs 53% average and 18% say Brexit will have a positive impact, triple that of the survey average.

Marketing is seen as playing less strategic a role than in other sectors. 47% feel it is

considered strategic vs 61% survey average and 28% feel it is perceived as a support function vs 19% survey average. They also less likely to have hard KPIs than other sectors.

There are different entry points into the professional services sector. There are opportunities in the marketing and digital functions that support the business and there are consulting roles in the newly forming marketing, communications and digital consulting arms of the large players. In the former, there is ongoing demand for those with brand, communications, events and tender/bid management skills. In the latter there is demand for those with significant, ideally international, digital and digital transformation skills, user and customer experience skills and for senior creative directors.

We have seen steady growth in demand for professionals across this sector, for roles in marketing management, events, communications, bid management and corporate affairs, with particular preference shown to those with previous professional services experience.

The professional services sector remains an attractive place to work. Respondents are more engaged than the survey average (69% vs 59%) and they are more likely to recommend their employer to a friend (74% vs 59% average).

Professional & Business Services Snapshot

- 65% Irish owned
- 53% more than 200 employees
- 70% female
- Customer sentiment worse than last year and lower than average
- More positive than average on future trading
- Less negative on Brexit vs average-39% negative impact vs 53%
- 40% well prepared for Brexit
- 73% salary increase
- Average benefits; more likely to get flexible hours
- Higher levels of engagement
- More likely to recommend employer
- More likely marketing support function
- KPIs of revenue, customer acquisition
- 74% budgets less than €1m
- Events, digital content, PR spend

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Account Director - Head of level	€95,000	€110,000	€101,250	€85,000-€100,000
Communications Manager	€65,000	€80,000	€74,167	€65,000-€85,000
Marketing Assistant	€35,000	€40,000	€37,500	€30,000-€40,000
Marketing Executive	€30,000	€45,000	€37,500	€35,000-€45,000
Marketing Executive Senior	€40,000	€65,000	€48,500	€45,000-€55,000
Marketing Manager	€40,000	€85,000	€64,167	€60,000-€90,000
Marketing Head of	€60,000	€110,000	€79,375	€85,000-€110,000
Marketing Director / CMO	€85,000	€210,000	€150,000	€120,000-€200,000
MD/Business Owner	€140,000	€180,000	€160,000	€130,000-€200,000
Research Head of	€100,000	€110,000	€105,000	€85,000-€100,000
Senior Consultant	€120,000	€160,000	€140,000	€120,000-€140,000
Sponsorship Manager	€50,000	€80,000	€65,000	€65,000-€85,000
Sponsorship Head of	€65,000	€100,000	€77,500	€80,000-€110,000
All roles average-Professional & Business Services			€81,148	

Note: We did not include roles in this sector where respondent numbers were low. Please reference roles in the detailed salary section of this report in Section 5- Salaries & Benefits.

8. sectoral analysis

Retail

The retail sector is a very fast paced and vibrant sector. It is Ireland's largest industry and private sector employer and from a marketing perspective is more regionally spread than other sectors, with one third of respondents based outside of Dublin.

With the backdrop of Brexit and with global political uncertainties, customer sentiment declined vs last year, with 72% positive sentiment the previous year, down to 49% this year. The future outlook is also considerably more negative than last year. 35% believe trading conditions will deteriorate in the 12 months ahead vs a survey average of 25% and vs 13% of retail respondents just a year ago.

But it is an interesting, if challenging and fast paced sector to work in. It remains highly competitive and sophisticated, as small and large retailers compete directly for customers with global players online. Marketing is considered to be a strategic function in retailing (70% vs survey average of 61%). It plays a key role in driving brand preference and market share and there is a responsibility on marketing to deliver both strategically and tactically with speed.

There is continued focus on putting the customer at the centre of retail strategy and on developing seamless customer touchpoints and experiences on and offline. The use of data is core to retail operations, with opportunities for those in data analytics, insight generation and in loyalty. Brand differentiation is critical and engagement is cemented via the development of destination and occasion led shopping, coupled with smooth online and in-store experience. Against this backdrop we have seen demand from a broad variety of retailers, for professionals with omni-channel experience, customer experience and e-commerce experience in particular, as well as for those with marketing and brand management and insights skills.

However there are some issues to be resolved in the sector. There is a higher cohort of those actively disengaged (27% vs survey average of 21%) and only 51% would recommend their employer to a friend vs 59% survey average.

Retail Snapshot

- 61% international
- 78% 200+ employees
- More regional spread
- 78% female
- Customer sentiment in last year average
- More negative future trading outlook
- 80% very negative Brexit impact
- Quite well prepared for Brexit
- 65% 25 days annual leave or less
- Least flexible/remote working
- 67% salary increase
- Higher actively disengaged
- KPIs of sales volume, market share, profit
- More likely to have strategic role
- Half have budgets of €5m+
- TV, press/outdoor, digital content spend

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Brand Manager	€35,000	€70,000	€54,500	€45,000-€70,000
Digital/Online Manager	€35,000	€75,000	€55,000	€55,000-€80,000
Marketing Executive	€25,000	€30,000	€27,500	€30,000-€35,000
Marketing Manager	€50,000	€70,000	€62,500	€50,000-€90,000
Marketing Head of	€75,000	€150,000	€104,688	€80,000-€110,000
Marketing Director/CMO	€100,000	€250,000	€162,500	€140,000-€200,000
PR Manager	€55,000	€75,000	€65,833	€50,000-€75,000
Sales/Commercial Manager	€75,000	€80,000	€77,500	€55,000-€80,000
All roles average-Retail			€77,798	

Note: We did not include roles in this sector where respondent numbers were low. Please reference roles in the detailed salary section of this report in Section 5- Salaries & Benefits.

8. sectoral analysis

Tech

The tech sector represents a vibrant mix of tech giants, Irish scaling companies, SME's and start-ups. Half of respondents work in Irish owned, typically smaller companies and half in multinationals. The sector continues to thrive and shows no signs of slowing down, with Ireland still being one of the largest tech hubs in Europe and many continuing to establish their EMEA or International operations here.

Sentiment is positive. 57% saw customer sentiment improve last year compared to 48% survey average and only 10% saw sentiment deteriorate. Future trading outlook is also confident with 88% foreseeing positive future trading conditions in the next year, vs a survey average of 75%. Although 29% feel Brexit will have an adverse impact, this is also considerably less than the average of 53%. They also feel somewhat more prepared than Brexit than other sectors.

There remains a talent shortage in the sector and the talent pool has not caught up with the pace of growth and demand. Tech hubs are developing outside the key cities in response to this and in response to the growing accommodation crisis. Tech companies are using flexible and contract talent to fill gaps during rapid growth phases to help scale and enter new markets and are also looking outside of Ireland for talent.

The shortage of talent has also led to salary spikes and better flexible working options in this sector. Benefits vary substantially by company size, with larger companies and non-Irish owned companies providing better benefits across the board. 80% of respondents enjoy some type of flexible working, in particular remote working and flexible hours.

The role of marketing in tech companies is considered increasingly strategic (75% vs average of 61% and up on 63% last year), with KPIs linked to revenue, acquisition and retention. The most in-demand skills are across demand generation, marketing automation, product management, customer marketing, digital marketing, along with global experience at all levels. Data analysts at all levels are in demand, but scarce and hence highly paid. There is also considerable demand for support to practitioner level professionals in digital, demand generation and key account roles, contributing to an overall shortage of talent in the market at this level and an upward pressure on salaries.

Tech sector respondents are somewhat more engaged than average (61% vs 59% average) and 61% would recommend their employer to a friend

Tech Snapshot

- 50% Irish owned/ 50% multinational
- Mix of business size
- 57% female
- Customer sentiment in last 12m higher than average
- More positive on future trading
- Much less negative impact of Brexit
- 34% well prepared for Brexit
- Benefits vary by size
- More flexible working
- Somewhat more engaged than average
- KPIs of customer acquisition, revenue
- 75% marketing strategic role
- Mix of budget size
- Digital, events, Direct mail

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Business Development Director	€95,000	€140,000	€116,250	€120,000-€150,000
CEO/MD/Country Mgr/Business Owner	€110,000	€220,000	€153,000	€120,000-€250,000+
Commercial Director	€80,000	€210,000	€130,833	€120,000-€200,000
Communications Manager	€60,000	€75,000	€67,500	€60,000-€90,000
Communications Head of	€60,000	€120,000	€88,750	€90,000-€120,000
Consultant - Manager level	€70,000	€90,000	€80,833	€75,000-€110,000
Consultant- Senior	€110,000	€190,000	€160,000	€110,000-€160,000
Data Scientist Senior	€80,000	€110,000	€93,750	€80,000-€100,000
Digital/Online Manager	€25,000	€90,000	€62,500	€70,000-€80,000
Marketing Executive	€25,000	€40,000	€32,500	€30,000-€40,000
Marketing Executive Senior	€25,000	€45,000	€35,000	€35,000-€45,000
Marketing Manager	€40,000	€100,000	€62,935	€50,000-€90,000
Marketing Head of	€60,000	€120,000	€93,000	€90,000-€130,000
Marketing Director/CMO	€80,000	€140,000	€111,875	€120,000-€180,000
Performance Marketing Manager	€50,000	€70,000	€60,000	€50,000-€70,000
Product Manager Senior	€100,000	€130,000	€115,000	€90,000-€120,000
All roles average-Tech			€78,728	

8. sectoral analysis

Telco

In this section we include fixed, mobile and quad play telco services. Other IOT companies are featured in the tech section.

The sector is competitive, fast paced and evolving and is comprised for the most part by large, well-funded international organisations, with 78% of respondents working for foreign owned companies, employing 200+. They work in relatively big marketing teams and 53% with marketing budgets of €5m plus.

Sentiment in the telco sector is relatively positive. Customer sentiment improved for 53% of respondents in the last 12m and although this was worse than the previous year, it was higher than the 48% survey average. They are also much more positive about future trading conditions than others. 50% feel conditions will improve for them in the next 12m, compared to 35% average. 41% feel Brexit will have a negative impact on their business vs 53% average.

They are also positive about working in the sector. They get strong benefits packages; a huge 92% enjoy some form of flexible working and get higher than average annual leave. Their engagement levels are somewhat higher than in other sectors too.

Marketing is considered core in helping achieve organisational revenue, profit and cashflow objectives. 75% feel that the marketing function is perceived as a strategic, revenue driving partner, vs a survey average of 61% and they are measured customer and commercially focused KPI's such as acquisition, sales, revenue and retention.

It is recognised still as an attractive industry for career development for support to manager career level in particular. The opportunity to work within an ever evolving landscape, with strong well supported brands and to own their numbers appeals.

As in previous years, there is ongoing demand for those with strong overall marketing and product management and proposition development expertise. There are opportunities for marketing campaign analysts and data analysts as well as those with digital transformation, social media and SEO expertise. Professionals from the telco sector are in turn sought after by those in financial services, technology and utilities in particular for their commercial and data led skillsets

Telco Snapshot

- **78% Internationally owned**
- **78% 200+ employees**
- **Better gender balance- 58% female/42% male**
- **Better customer sentiment**
- **Much better future trading than average**
- **Brexit to have negative impact, but less than survey average**
- **35% well prepared for Brexit**
- **Significantly more benefits- bonuses, contributory pension, flex hours, remote working, healthcare**
- **Highest salary increase-84%**
- **Slightly more engaged than average**
- **Marketing more strategic role**
- **KPIs of customer acquisition & retention, sales, revenue**
- **53% €5m + budget**
- **Spend on digital content, SEO/PPC/ATL-press, radio, outdoor**

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Brand Head of	€85,000	€120,000	€101,250	€90,000-€120,000
Campaign Manager-Sr	€60,000	€80,000	€70,000	€60,000-€80,000
Communications Head of	€85,000	€90,000	€87,500	€85,000-€100,000
Digital / Online Manager	€45,000	€70,000	€57,500	€60,000-€80,000
Insights Manager	€75,000	€80,000	€77,500	€70,000-€90,000
Marketing Executive	€25,000	€40,000	€32,500	€30,000-€45,000
Marketing Executive Senior	€45,000	€60,000	€52,500	€45,000-€55,000
Marketing Manager	€40,000	€85,000	€62,500	€60,000-€90,000
Marketing Head of	€95,000	€110,000	€101,250	€90,000-€130,000
Marketing Director / CMO	€80,000	€210,000	€134,375	€140,000-€200,000
All roles average-Telco			€82,188	

Note- we did not include roles in this sector where respondent numbers were low. Please reference roles in the detailed salary section of this report in Section 5- Salaries & Benefits.

8. sectoral analysis

Utilities

This sector includes utilities such as electricity, gas, waste and water. It is a competitive and active sector and with markets having been liberalised, the role of marketing in brand building, customer acquisition and retention and in customer experience has been key to success.

Market conditions in this sector are relatively positive. Although consumer sentiment declined a little vs last year, the future trading outlook is less negative than other sectors. Only 14% feel conditions will deteriorate vs a 25% survey average. The perceived future impact of Brexit is also considered to be less negative than that of other sectors (39% negative impact vs 53% average).

Despite the critical role of marketing in business success, only 45% of respondents in the sector feel that marketing is seen as a value adding strategic partner, vs a survey average of 61%. Many struggle to alter perceptions of marketing as a communications and support function, in what are often engineering or finance led, or ex semi-state organisations. The key skills they feel they need to develop to be successful, aligned to this challenge, are strategic planning, insights and marketing effectiveness. The ability to influence stakeholders is also critical.

The sector still draws in good talent, with new professionals attracted by strong brands and budgets. 41% of respondents in this sector work with budgets of €5m plus, with much of spend focused on TV and sponsorships.

There is steady demand for both B2C and B2B professionals across a broad range of marketing disciplines and for those with strong data, acquisition and retention skills. Strong communications specialists- both internal and external-are also sought after. There remains a need for those with change management and cultural and business transformation experience.

Salaries tend to be at the mid to low level vs average. Benefits are broadly on par, but pensions and bonuses are more generous than other sectors. However there is a significant level of disengagement to be addressed. 38% of respondents rate their engagement at 4 out of 10 or less, almost double the survey average of 21% and only 45% would recommend their company to a friend.

Utilities Snapshot

- 65% Irish owned
- 84% 200+ employees
- 65% female
- Less positive customer sentiment
- Less positive future trading
- 39% negative impact of Brexit; less negative than average
- Somewhat less prepared for Brexit
- Good benefits more bonuses and non-contributory pensions
- Average annual leave
- Less flex working
- 70% salary increase
- Higher than average actively disengaged
- Lower would recommend to a friend
- Less strategic role for marketing
- KPIs of customer acquisition, brand, sales
- 41% €5m plus budgets; 41% less than €1m
- Spend on sponsorship, digital SEO/PPC, TV

Role	Survey Min	Survey Max	Survey Aver	Alternatives View
Communications Manager	€40,000	€65,000	€52,500	€60,000-€90,000
Digital / Online Executive	€35,000	€40,000	€37,500	€35,000-€45,000
Digital / Online Manager	€50,000	€85,000	€67,500	€55,000-€75,000
Marketing Manager	€60,000	€90,000	€78,214	€65,000-€85,000
Marketing Head of	€65,000	€120,000	€95,833	€90,000-€120,000
Proposition / Segment Manager	€80,000	€85,000	€82,500	€70,000-€85,000
Research Manager	€40,000	€55,000	€47,500	€45,000-€55,000
Sales & Marketing Manager	€35,000	€75,000	€55,000	€55,000-€80,000
All roles average-Utilities			€70,682	

Note- we did not include roles in this sector where respondent numbers were low. Please reference roles in the detailed salary section of this report in Section 5- Salaries & Benefits.

the sponsors



The Marketing Institute is the professional body for Ireland's marketing people. It exists "to enable marketers to build great brands and great careers". It does this by sharing best practice, insights and expert content, building the community of marketers, and aiding marketers in career progression. The three themes of content, community and career underpin all Institute activities. The Marketing Institute also owns and operates the All Ireland Marketing Awards, the CMO Summit, and DMX Dublin, Ireland's largest marketing conference.

If you would like to know more about us
contact us on:

hello@mii.ie
+ 353 1 295 2355

www.mii.ie

the sponsors



The Alternatives Group is an award-winning, dynamic consultancy specialising in all things marketing, digital & customer. Operating for 20 years, we are deep specialists in the key disciplines which unlock growth for business and careers.



Marketing



Digital



Data



Customer

Our alternatives for growth

Alternatives Flexible Panel

An agile team of Interim Managers, contractors, and consultants, on hand to transform and unlock growth.

Executive Search & Recruitment Solutions

For global and Irish talent. From full recruitment process management, to modular solutions.

Consultancy

Marketing organisation design, recruitment consulting, talent attraction and strategic marketing consulting.

Training & Coaching

Full suite of in-house marketing & digital capability training & coaching.

Talk to our specialist team today and see how we can be your alternatives for growth.

hello@alternatives.ie

+353 1 661 8889

www.alternatives.ie



new natives

new ways of working

salary, market insights
& sentiment **survey 2019**



The
Marketing
Institute



T. + 353 1 295 2355
www.mii.ie

T. + 353 1 661 8889
www.alternatives.ie