

salary, market insights  
& sentiment survey 2021  
**key findings**



# Alter

your trajectory





## key findings summary



### market outlook

**Negative impact of Covid on business, but positive for one in five**

**49% respondents' businesses have been impacted negatively by Covid.** Those most negatively impacted are the broad travel and tourism sector, Ireland's largest employer, (90-94% negative) as well as consumer goods such as motor, food, drinks, manufacturing and construction.

However, the impact is less negative now, almost a year in, than in previous surveys we carried out. In Alternatives Covid pulse survey in May 2020, 80% said their businesses had been negatively impacted and 70% in September.

Not every sector has been hit in the same way and **one in five has been impacted positively.** Agri, tech, e-commerce, retail and logistics have seen the most positive impact of the pandemic on their businesses.

Irish owned companies have been harder hit than multinationals with 53% having felt a negative impact, compared to 42% of multinationals. Smaller companies were also more impacted.

**Expected Impact of Brexit negative, but less negative than a year ago**

Impact is highly sector dependent, with one third of respondents negatively impacted and those in FMCG, motor, agri, drinks, retail and manufacturing most impacted (50%-73% negatively impacted). That said,

the level of impact anticipated was considerably more negative in 2019, when 45% expected a negative impact vs 33% today.

The sectors most impacted now, felt more exposed in 2019 than today, reflecting good levels of preparedness for Brexit over the intervening period. (motor 94% vs 64%, retail 82% vs 52% today, FMCG 81% vs 73%, drinks 81% vs 53% today).

### Trading next 12 months expected to improve

With so many companies having been hit significantly by Covid in 2020, there is an expectation that 2021 will be better. 56% expect trading performance to improve, including those sectors least impacted by Covid last year. 18% expect no change.

However, 23% expect trading to further deteriorate, in particular motor, FMCG, construction, financial services, retail.

### Hiring outlook is more positive

	May 2020	October 2020	January 2021
Hiring	19	42	65
Not hiring	63	42	28
Don't know	18	17	4

65% will hire a little or a lot this year, a big improvement on last year. Travel/tourism/leisure, media & publishing, manufacturing, FMCG and financial services sectors are

least likely to hire and tech, pharma, healthcare, gaming, e-commerce and education sectors are most likely.



### employment, salaries & benefits

**Employment impacted, but better now than in the 6 months post Covid**

The previously very buoyant market and strong demand for talent was impacted negatively due to Covid. There is a slight decrease noted in respondents on permanent contracts (85% now vs 87% in 2019).

There is an increase in those unemployed or on temporary layoff, from 2% in 2019 to 4% now.

However, previous 2020 Alternatives Covid Pulse surveys show higher unemployment figures, so the situation has improved for most since then. In May 2020 11% were on temporary layoff and 4% unemployed. In October temporary layoffs had reduced to 3% but 6% were unemployed.

Hotel and tourism, media & publishing and agencies were the hardest hit. Those at senior level were impacted the least by permanent redundancy and those at career entry level, the most.

Despite the current difficult context, 75% of respondents **remain secure or very secure** in their roles, up on the October survey when it was just 57%. 10% are insecure, with support level least secure.

## key findings summary

### Salaries have been impacted by Covid

**Salaries** have been impacted by Covid. In the course of the last year, 10% have had their salary decreased, 6% by 11% or more. 42% had no change to salary.

44% got an increase in salary last year, mostly of 1-5%, but in some cases these may already have been in place before Covid hit.

However, the full year position is not as severe as that noted earlier in 2020. In Alternatives Pulse survey in May 2020, 32% had temporary salary reductions and in October 2020, 24% of respondents did. Many had cuts to bonuses and to working hours.

Travel/airlines, media & publishing, agency and tourism sectors had highest levels of salary decreases throughout and pharma and healthcare the highest increases.

**Average salaries** are at similar levels to the previous year, except at most junior levels which fell and at director levels which increased. That said, directors had taken the greatest temporary hits to salary at the first lockdown when 46% took reductions to salary, half of which 20% or higher.

### Salary average and range, by career level:

<b>Support</b> (early career)	Average €30k vs €34K vs end 2019. Mid-range €25-40k
<b>Practitioner</b>	Average €51k- no change. Mid-range €40-55k
<b>Manager</b>	Average €69k vs 70k. Mid-range €55-85k.
<b>Head of</b>	Average €97k vs €100k. Mid-range €85k-120k
<b>Director</b>	Average €141k vs 132k. Mid-range €110-170k

### Benefits are similar to last year, despite Covid.

**Benefits remain much as last year** and increase in line with seniority. Mobile phones, contributory pensions, bonuses and healthcare are the most frequent benefits. 11% get no benefits at all and this ranges from 5-8% at higher career levels, to 35% of those at support level. Multinationals offer considerably more benefits across the board than Irish owned companies. More got healthcare than in previous year maybe a result of increased focus on health and wellbeing by all.

There is less of a differential this year between males and females which is a positive development.

**Annual leave** allowances increased, particularly at practitioner and manager level. Larger/multinational companies offer better leave.

### Bonuses remain at similar levels, despite Covid

69% have a bonus component element to their package, vs 70% last survey. 34% get up to 10% of salary, 21% up to 20% and 14% can get 20% upwards. This rises in lien with seniority.

### Salaries- The gender dimension

Of our 855 respondents this year, 36% are male and 64% female i.e. There are 1.8 females for every male, unchanged from last year, reducing to director level where there is more balance with 1.2 females to every male. Whilst female representation is positive, it is critical that the function attracts and retains both genders to ensure a more balanced industry.

### Salaries & differential by gender & level

	All roles (Average)	Female (Average)	Male (Average)	Male diff vs Female €	Male diff vs Female TY %	Last year
Director	141,156	135,357	147,591	€12,234	9%	14%
Head of	97,159	95,191	101,164	€5,973	6%	11%
Manager	69,118	68,929	69,536	€607	1%	7%
Practitioner	51,096	50,738	52,012	€1,274	3%	1%
Support	30,724	30,938	30,357	-€580	-2%	-4%



## key findings summary

**Male respondents continue to be paid more on average than their female counterparts**, with the exception of the first stage of their career. The differential then increases the more senior the career level, up to director level when the differential reaches 9%, or an average of €12k.

However, on a positive note, the differential has decreased across all career levels vs our last survey at the end of 2019, when it ranged from 7% at manager level up to 14% at the most senior level.



### engagement

**Despite a tough year, personal engagement/happiness in the role is up, but still half expect to move on from company within 2 years.**

Overall personal engagement rating of **63/100**.

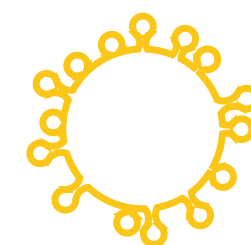
**Levels of engagement are up in general vs 2019** (63/100 vs 59/100), halting the downward trend in engagement of previous years. Engagement increases in line with seniority. Directors (71/100) and heads of level (68/100) remain most engaged. However, practitioners and support level are much less engaged, at 55 and 54/100 respectively.

**The key factor in driving engagement** is working in a meaningful role. The people dimension is even more critical than before, after a year where many have worked on their own from home. 47% want to work alongside great colleagues, vs 36% last year; 42% to work with a great boss vs 39% the year before. Earlier career

stage respondents, who particularly value this people interaction, are much less engaged and as we will see, coping less well overall.

**More respondents would recommend their employer to a friend** than in the last survey (64% vs 59% in the previous survey). However, only 54% of support level respondents would recommend their company to a friend and a third overall aren't sure or would not.

Despite higher engagement and security, on average half of all **respondents expect to remain** less than 2 years in their current company.



### coping and working with covid

**Early career stage coping less well personally with Covid**

The average rating was **63/100**. 16% are not coping well personally.

The overall rating increases in direct line with seniority. Directors rate themselves as 70/100 overall, support level at just 55/100.

One third of directors are coping very well at 80/100+ and three quarters at 60/100 or more. Conversely only 16% of earlier career stage respondents rate themselves at 80/100 + and more than one in four are finding it challenging or very challenging.

### Remote working now and post Covid- Clear move towards blended working

94% of respondents' companies offer remote working options to them at the moment. 66% of respondents are working remotely due to Covid; 31% are working remotely, unrelated to Covid.

With regard to plans for 2021 and beyond, there has been a huge shift. In the last pre-Covid survey, 45% of respondents could work remotely from time to time. 73% of respondents will now work full time from home or a blend of remote working and workplace.

### Company policy regarding your place of work in 2021 and beyond

Working from home full-time on ongoing basis	15%
Work a mix of home and office/workplace on ongoing basis	58%
Work back in the office/workplace full-time as soon as we can	10%
Company hasn't decided yet	10%
I'm not aware yet	4%

65% of large companies will operate a blended policy. 17% of larger companies and multinationals will have full-time working from home policies vs 13% of Irish owned companies.

13% of Irish owned companies want their staff back fulltime in the office vs 8% of multinationals.

## key findings summary

However, 20% of small companies will work from home full-time.

Attractive blended or remote working policies should be considered by companies in the competition for talent.



### diversity in company and function

**Few sectors are very diverse and ethnicity and physical ability score lowest**

Diversity is now a key agenda item for all major businesses. Just one in five respondents consider their companies or functions to be very diverse, with most (63%) considering it somewhat diverse. Females and those at early career level are more likely to feel their companies are not diverse at all.

#### Diversity in your function/company

	Not diverse at all	Somewhat diverse	Very diverse
Overall diversity	14%	63%	20%
Gender	9%	41%	47%
Age	7%	54%	36%
Nationality	21%	46%	30%
Sexual orientation	18%	45%	23%
Ethnicity	29%	46%	20%
Physical abilities	50%	31%	9%

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- Very diverse sectors: e-commerce (54%) tech, pharma, telco, manufacturing (28%)
- Not diverse at all: construction (38%), not for profit, government, pharma (20%)

Companies score lowest in ethnicity and physical diversity.

46% feel there is some **diversity of ethnicity**, but only 20% rate it very diverse. Small companies are least diverse in ethnicity (35% vs 29%) and larger companies, in sectors such as tech and pharma, are most likely to be somewhat diverse. Least diverse are construction, drinks, FMCG, agency and education sectors.

Only 9% say their companies/function are diverse in **physical abilities** and only 31% feel somewhat diverse. Smaller companies are the least diverse in this regard and construction, agri, drinks/FMCG, manufacturing and agencies are the least diverse sectors.



### the evolving marketing role and function

**Marketing role is somewhat more strategic.**

**Need for broad customer and stakeholder skills as increase in shared responsibilities with other functions.**

63% felt that marketing played a strategic, revenue generating role in their organisation, up from 61% last year. Marketing plays the most strategic role in sectors that are very brand and consumer focused such as retail (85%),

drinks, tech, pharma, FMCG and telcos/ICT.

It is most likely to play a support role in sectors such as government (62% of gov respondents), education, construction & property, professional & business services and utilities, unchanged from previous years.

Marketing will add most value and enhance its reputation when it delivers across the **full customer agenda**.

Marketers will need to be upskilled in areas outside of the classical remit of marketing & brand management, insight and communications to further build their broad business involvement and impact. There is a move towards more shared responsibility and project ways of working, accelerated by Covid, and marketers should continue to develop capabilities in areas such as business strategy, customer experience and proposition development, as well as stakeholder management.

Against a backdrop of Covid and Brexit, with strategy being revaluated and more business and engagement online, **top areas of focus now** include strategic planning, brand management and digital strategy & communications. A growing need to demonstrate return on investment and the value-add role of marketing is seen in the high priority placed on marketing effectiveness.



## key findings summary

### As a result of Covid and Brexit for certain sectors, marketers are now operating with tighter resources.

Teams and budgets are small and smaller than in our last survey.

45% teams are of 5 people or less, compared to 42% end 2019. Agencies, media & publishing, healthcare, pharma, not for profit and education sectors and Irish owned companies are most likely to have the smallest teams. Financial services, utilities, gaming, tech and telco and multinationals are most likely to have teams of 20-40 plus.

**Budget sizes remain small** and 46% plan to spend €500k or less. **28% plan to decrease budgets** further this year, especially those in travel, construction, education, media, drinks and FMCG. 20% plan to increase, in particular those in government sectors, tech, pharma and retail.

**Key areas of spend** will be digital content, PPC/SEO and above the line communications. Research will also be a key focus vs last year, as companies try to understand customers evolving mindsets as they deal with Covid.



### the outlook

From a marketing and a resourcing perspective, there is some light at the end of the tunnel, after a very tough year for businesses and for people personally.

Some sectors have been hugely impacted and recovery will be complex. But others have adapted, pivoted or benefited from the crisis. Businesses will continue to need the skill sets that a strong, strategic marketing function can bring to drive a customer led recovery.

The focus on employees' wellbeing is paramount in the year ahead. Not all are coping in this crisis and as the lockdown extends many are being pushed to their limits, especially those at earliest career stage. We need to find ways to support and help them navigate their companies and their careers in the months ahead.



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