



Broadcast and Digital
Recruitment Specialists



Salary Survey
2013

Major Summary Trends

An Introduction

Method

Key Findings Title Page

The Digital Sector

Mobile Developer

UI Developer

Java Programmer

Digital Project Manager and Product Owner

The Broadcast Sector

Test Analyst

Broadcast Engineer

Business Analyst

Project Manager

The Commercial Sector

Account Manager

Pre-sales

Sales and Commerical Director

Other findings

Fringe Benefits

Degree

Who has the itchest feet?

Genders

Thank You



Top Level Observations

Overall the survey showed that although demand in the market has recovered from the worst of the lows during the recession, overall rates for contract positions have remained remarkably stable from the pre-recession levels, with a few specific exceptions. Highlights for permanent job seekers are significant increases in average salaries for project managers in both the broadcast technology and digital media sectors, and solid demand for experienced sales and marketing professionals across the board.

Best regards,

A handwritten signature in white ink, appearing to read 'Judith Blair', with a long, sweeping underline.

Judith Blair

Managing Director
PCR



An Introduction

PCR are a specialist and well respected Broadcast Technology & Digital Media recruitment consultancy. We were established in 1991 and since 2005 have focused primarily on the broadcast, digital media and ecommerce/e-tail markets. With the rollercoaster ride of the UK economy since the end of 2008, we undertook a salary survey in the first quarter of 2013 to examine how employment trends in our own chosen sectors had fared against this backdrop. We examined trends in some of the core skill areas which have remained in demand across these sectors, with specific focus on whether pay rates had suffered, stabilized or increased during the period 2010-2012, as the overall economy attempted to emerge from recession, and companies in our own sectors regained confidence to invest for growth, or indeed continued survival, in the rapidly changing markets in which PCR operate.

Method

Data was collated for the period 2010-2012, using a combination of data from our own extensive candidate and client database, and an on-line survey promoted to over 2500 selected candidates working in the sectors. The data was then analysed across three specific job families: Broadcast specific technical roles (both contract and permanent), digital specific technical roles (both contract and permanent) and commercial specific roles across the sectors (permanent only).

Disclaimer: each role's skill set, in pie chart format, is based upon the data collected from our salary survey questionnaire conducted from January-March 2013.



Our Findings



Salary Survey 2013

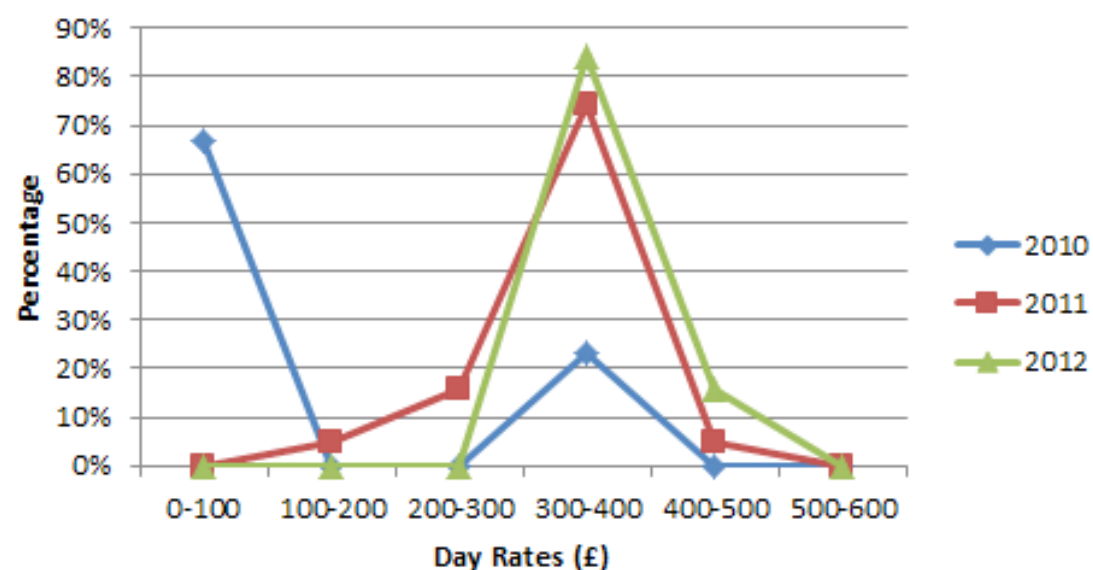
The Digital Sector



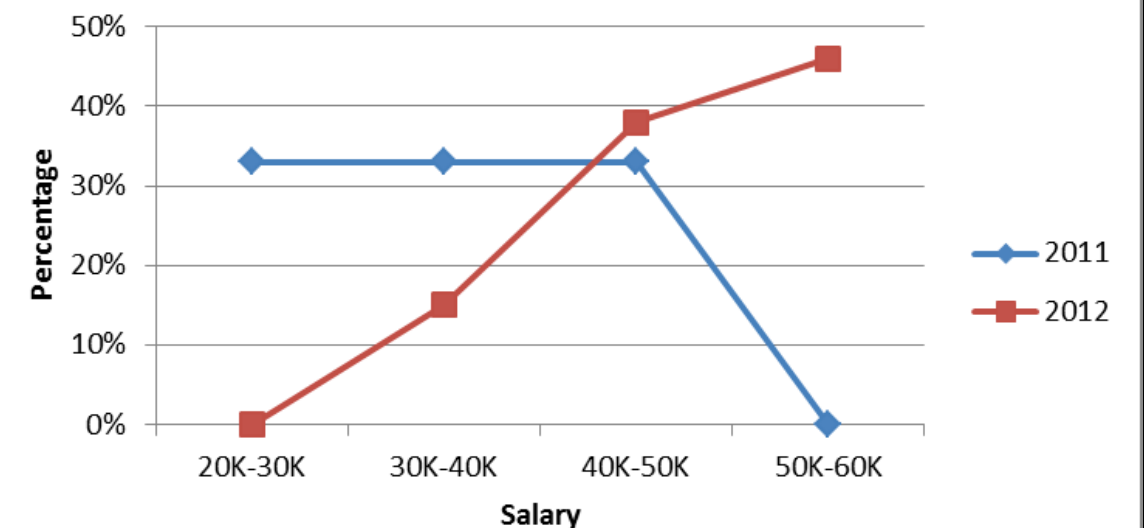
Mobile Developer

With the explosion of use and availability of smart mobile devices over the period surveyed, growth in demand for candidates with development skills in the area has obviously mapped a similar pattern. As applications have become more sophisticated, and fully functional versions of existing websites have been launched as well as mobile-specific sites, highest demand for contract developers with mobile skills has moved from the lower end simple app development languages represented in the 2010 data line, up to the primary demand for developers with wider skill sets such as HTML5 in addition to iOS and Android, commanding day rates in the 300-400 per day range, and above to a more limited extent. From our own experience in placing candidates, many are from “traditional” web development backgrounds who have now acquired the additional skills needed work in the multiplatform projects.

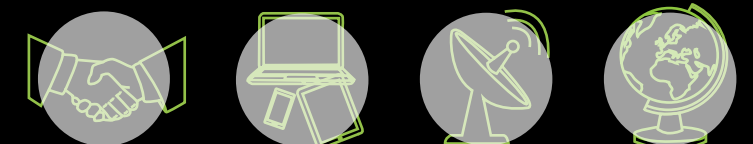
Pay Rates for a Contract Mobile Developer from 2010-2012



Percentage of Rates for Permanent Mobile Developers from 2011-2012



Contractors are in high demand in this area, probably due to the fact that technology is continuing to change quickly and so leading edge skills are essential to inject at key points in a multiplatform development project. However as can be seen from the permanent data, there is also an increasing trend in the last 18 months particularly to bringing on board more senior permanent mobile developers to steer key projects from within the business – we have not included any data from 2010 for permanent positions as the sample sizes were too small to be of significance – also a clear indication of the shift in the market in the last 18 months.

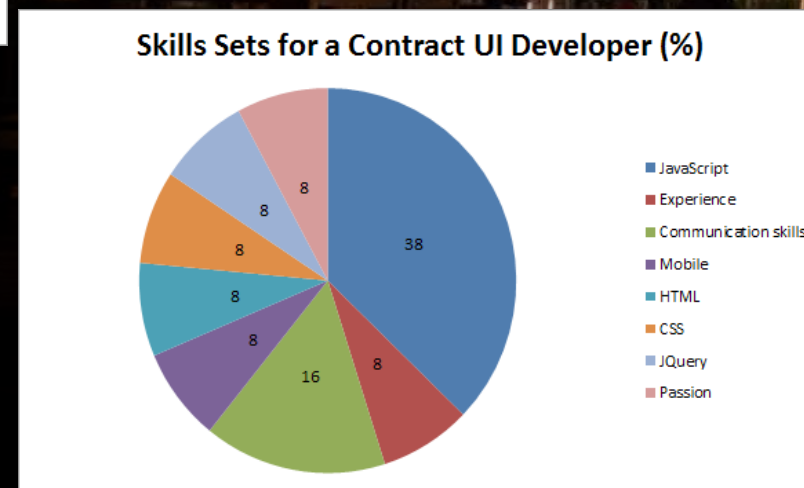


UI Developer

*(In order to look at this more generic developer role, we separated out the findings for the mobile specific positions and survey respondents to get a more accurate picture for both categories).

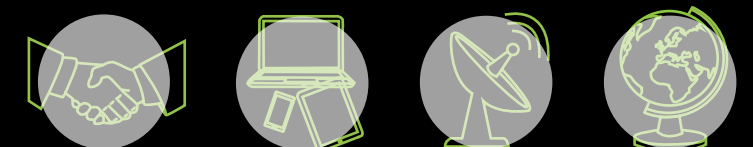
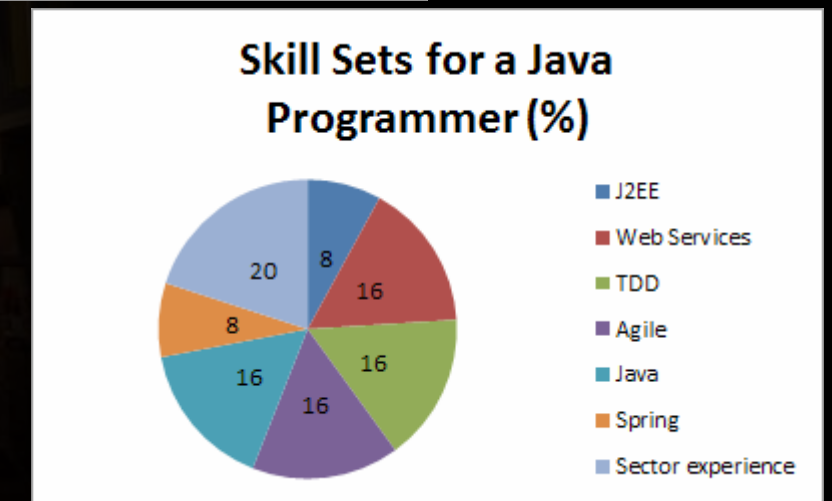
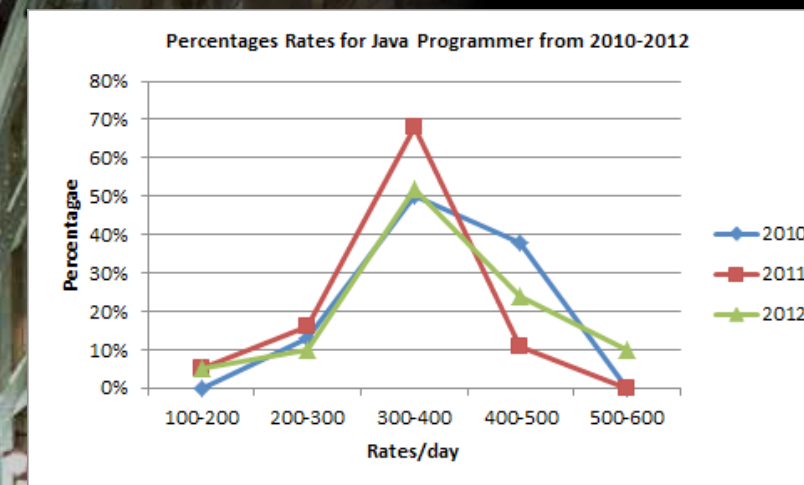
In this category we looked specifically at demand and pay rates for contract developers as this was an area hit very hard during the depth of the UK recession as demand dropped almost overnight in clients such as digital agencies. The most striking finding is that although demand has increased steadily over the period, rates have remained relatively stable year on year, with limited demand at the top and bottom end, and the vast majority of contracts being engaged at the 3-400 pay rate per day. Some movement is seen during 2012 to a higher percentage of contracts (13% from 3% previously) being engaged at the 4-500 day rate than in previous years.

Anecdotally many developers report larger gaps between contracts during the survey period than they have previously experienced, which might be expected to indicate potential reduction in rates if availability outstrips demand, however our data shows that clients are willing to pay good market rates for the skills needed.



Java Programmer

The rate range for java has remained reasonably consistent over the period, with 3-400 being the most common rate, with a peak in demand during 2011 in this range. Demand for developers at the higher pay band peaked in 2010 then appeared to drop significantly, with some recovery in this range during 2012. The most likely rationale behind these fluctuations would appear to be the rise and fall of demand in the financial sector, leading to constraints on availability and hence rate pressure at the more senior end of the scale, to be able to attract contractors to work in other sectors.



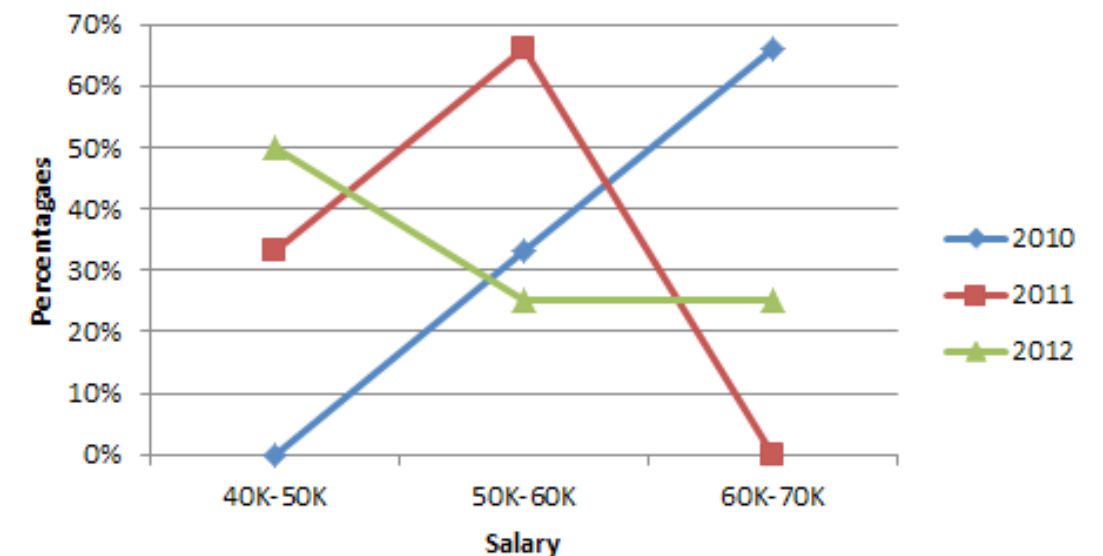
Digital Project Manager and Product Owner

This category is one that has seen major fluctuations in both demand and rates paid over the period, probably driven by a number of influences:

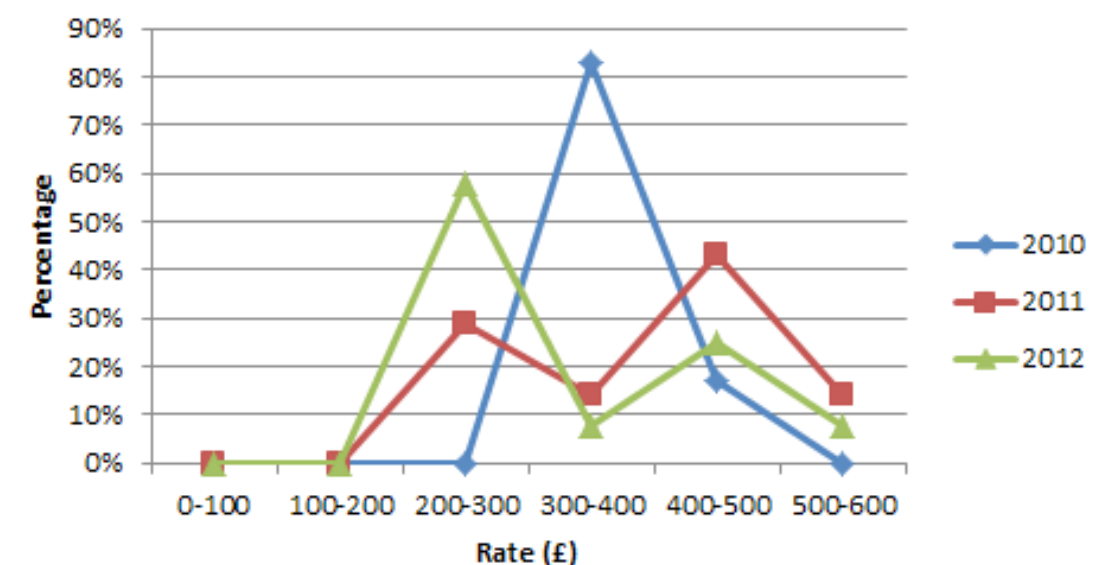
- Capital projects being started/restarted as the UK and particularly the media sector started to emerge from recession
- Fierce competition in the sector for new technologies driven by the emergence of VOD players and the entry of US competitors to this market, creating demand for project managers capable of running large scale multi-platform projects
- Retailers particularly moving more and more of their business online in a bid to reduce costs, combined with increasing numbers of online only retail operations
- The growth of the online gaming and betting market over the period

However within this context, there is significant difference year on year in demand in different salary and rate brackets, with peak demand in 2010 being at the higher band of 60-70k for permanent pms, whereas the demand in 2012 was higher at the more junior end of the scale. Similarly demand for contract pms peaked during 2010 at the 300-400 per day range, whereas over 2011 to 2012 demand has been more evenly spread across the mid to senior end range, with the highest demand during 2011 peaking in the 500 per day range. Again this may be a reflection of company's skilling up first for senior staff, and bringing in higher end pms during 2011 to ensure that projects commencing, which would be delivered in Olympics year particularly, had the very best skills applied in the planning phases.

Percentage rates for Permanent Product Manager from 2010-2012

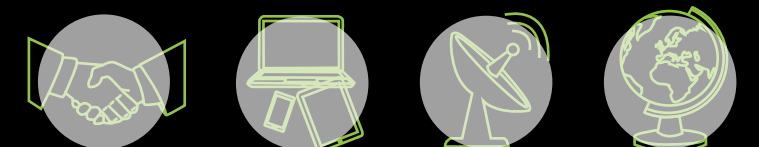


Pay Rates for a Contract Digital Project Manager from 2010-2012



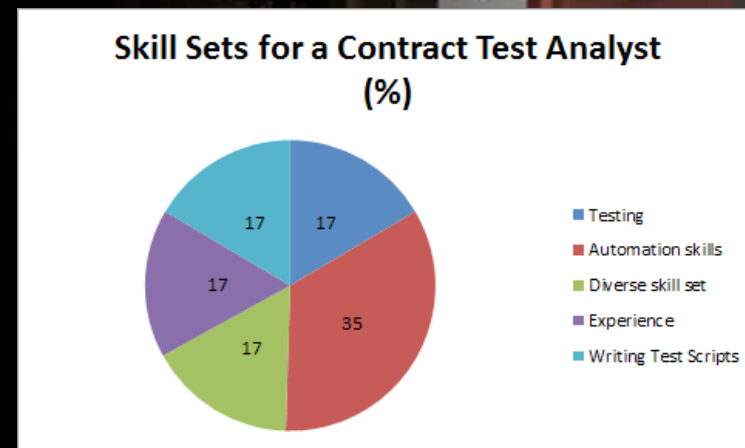
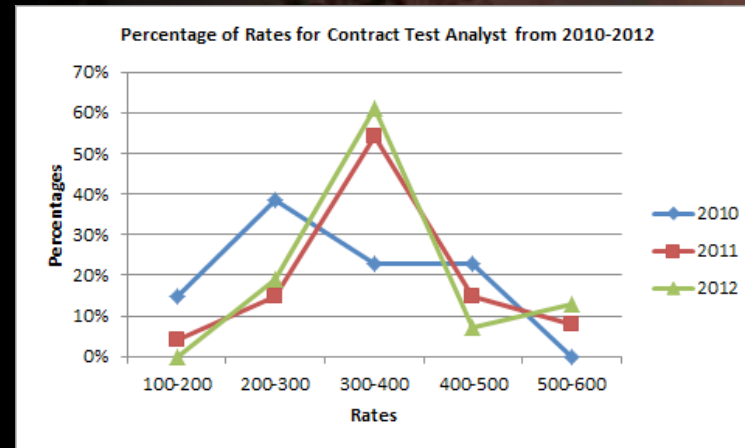
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The Broadcast Sector

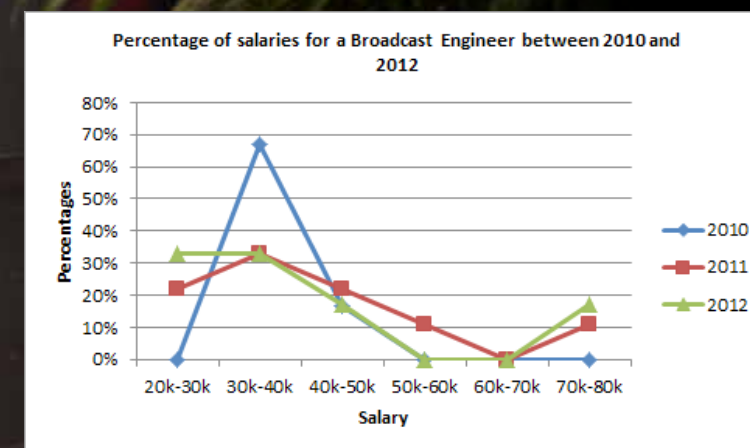
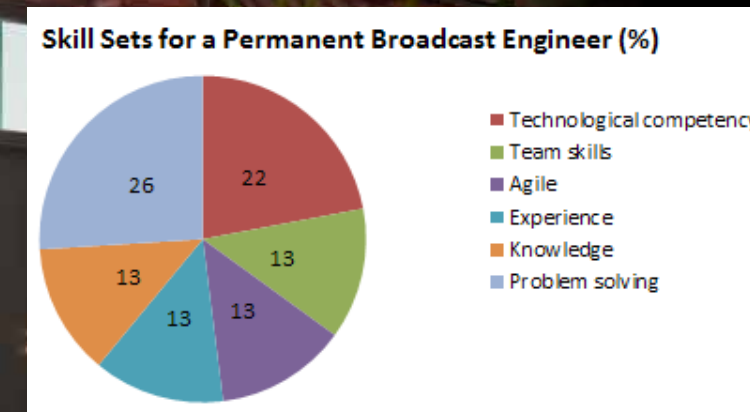
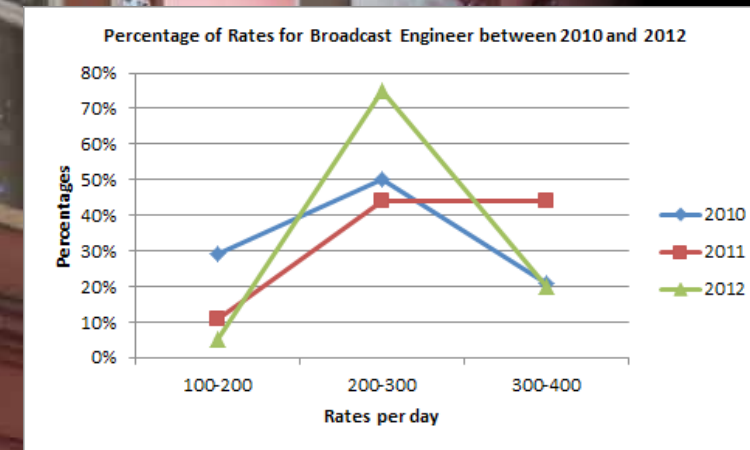


Test Analyst

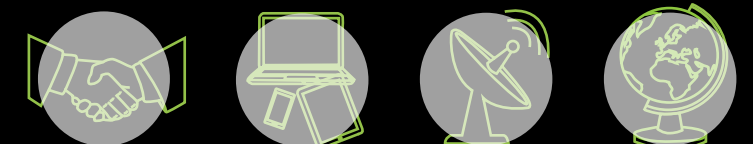
This is a category in which the skill sets required from clients has changed very significantly over the period, and the fluctuations seen in rates for contract testers clearly reflect this, tracking the rise in demand as new systems and services developments commenced during 2010 were rolled out during 2011 and 2012: the major change has probably been in the sophistication of testing skills required, with more and more system and process testing moving from manual process to automated test techniques, as the nature of workflow and tools available has advanced at a rapid pace, and broadcast systems have become increasingly driven by sophisticated software programs. Tracking this change, the average rate for broadcast systems testers moved upwards over the period, with the peak being in the 3-400 per day range with volume demand during 2011 and 2012, but also with increasing demand for contract test managers on day rates of £500+ to oversee complex test programs.



Broadcast Engineer

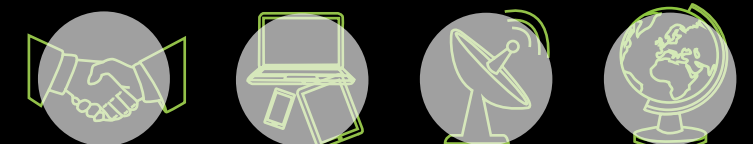
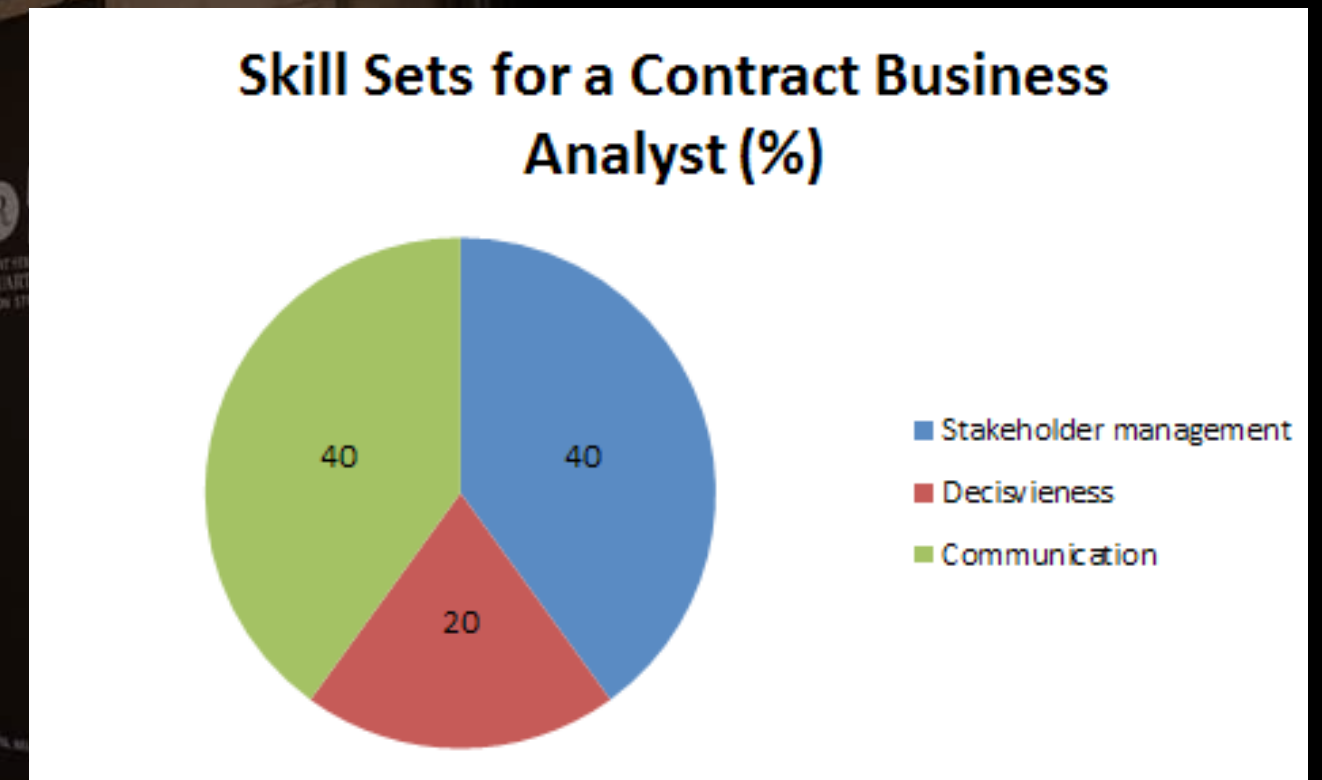
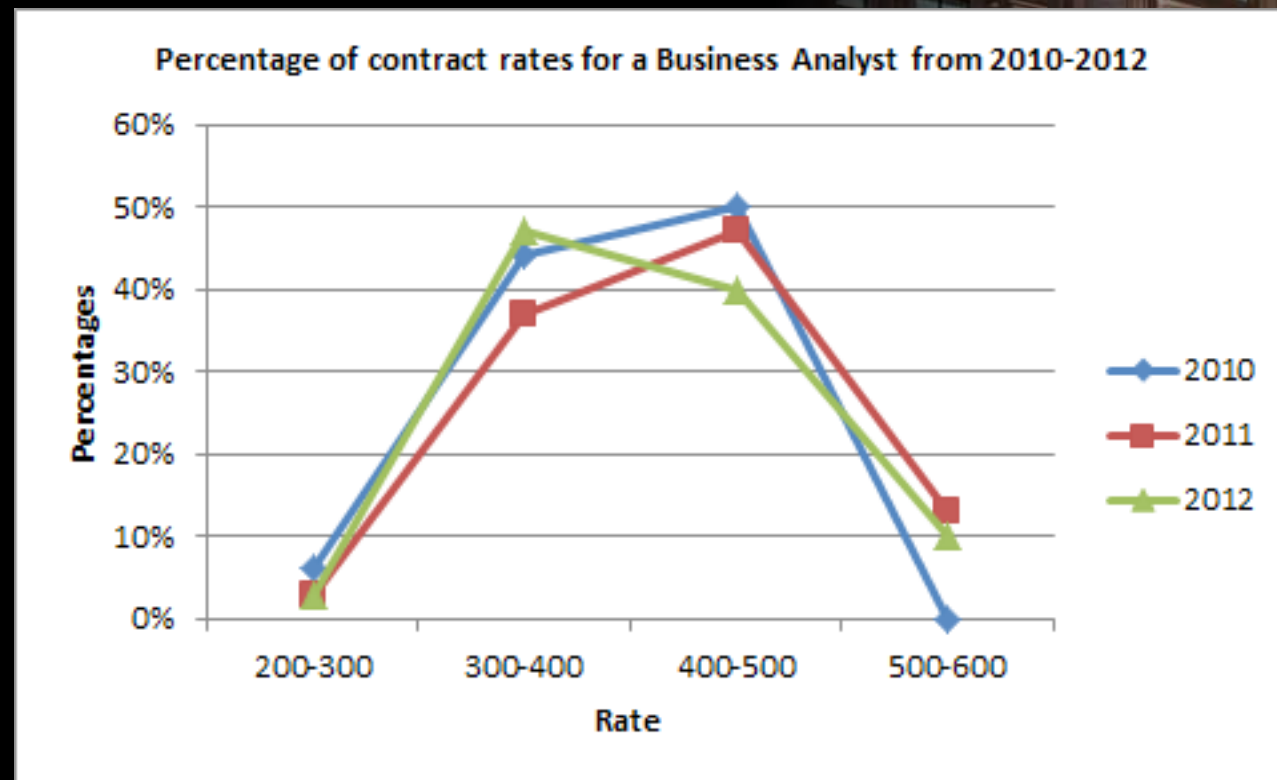


It appears that the demand for contract broadcast engineers reached a peak during 2012, not surprising given the activity amongst broadcasters in and around the Olympics and Paralympics. In general, demand has remained solid for contractors over the period of the survey, with higher demand at the upper rate ranges seen during 2011, coinciding with build out phases for some major projects in the industry at the time, and hence demand outstripping supply. However since the completion of many of these projects, anecdotally we are seeing the opposite effect during the latter part of 2012 and the early part of 2013, with pressure on rates and many contractors seeing significant gaps between assignments. On the permanent side, opportunities have been on the low side since a peak in 2010, and salary range remains solidly in the 30-50k range over the period, with some exceptions for more senior and managerial positions.



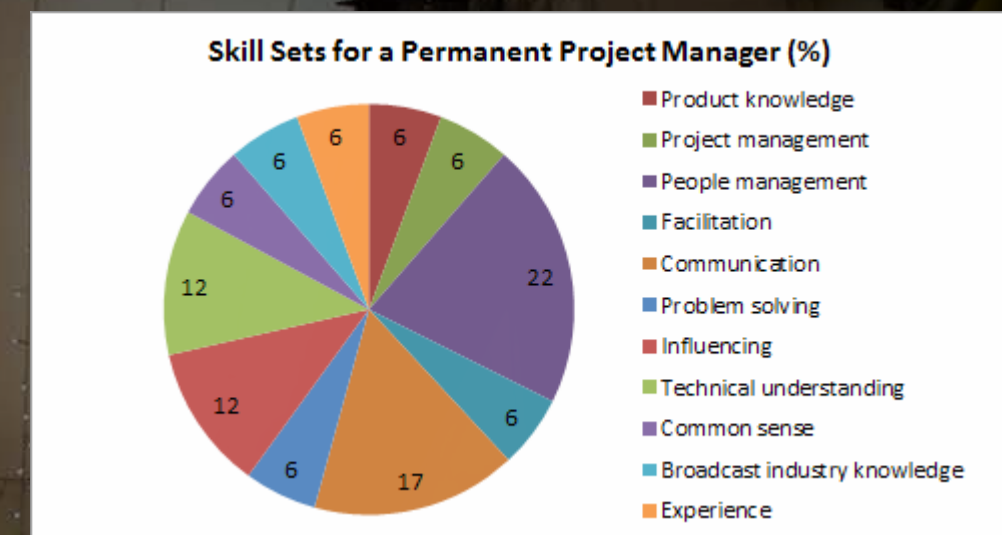
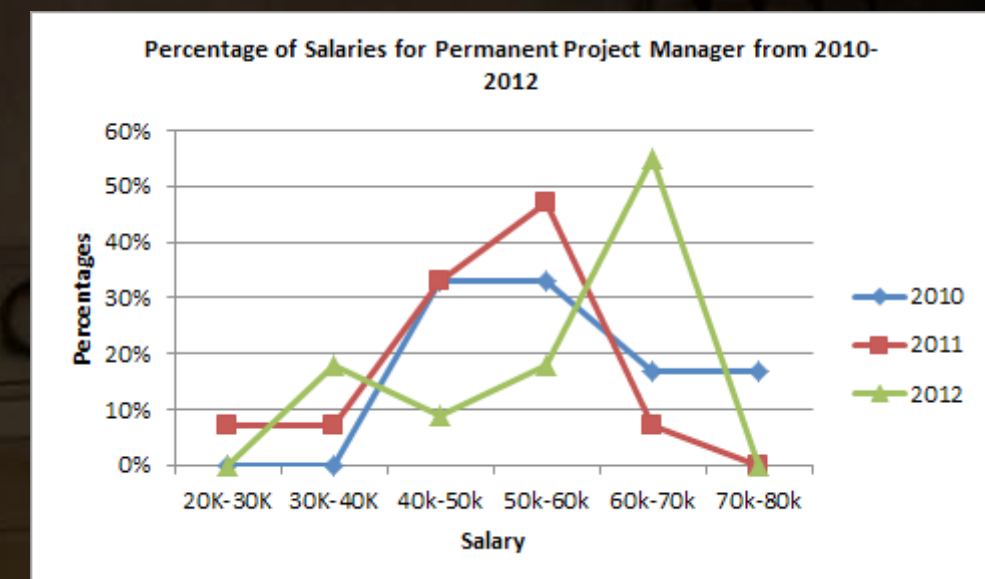
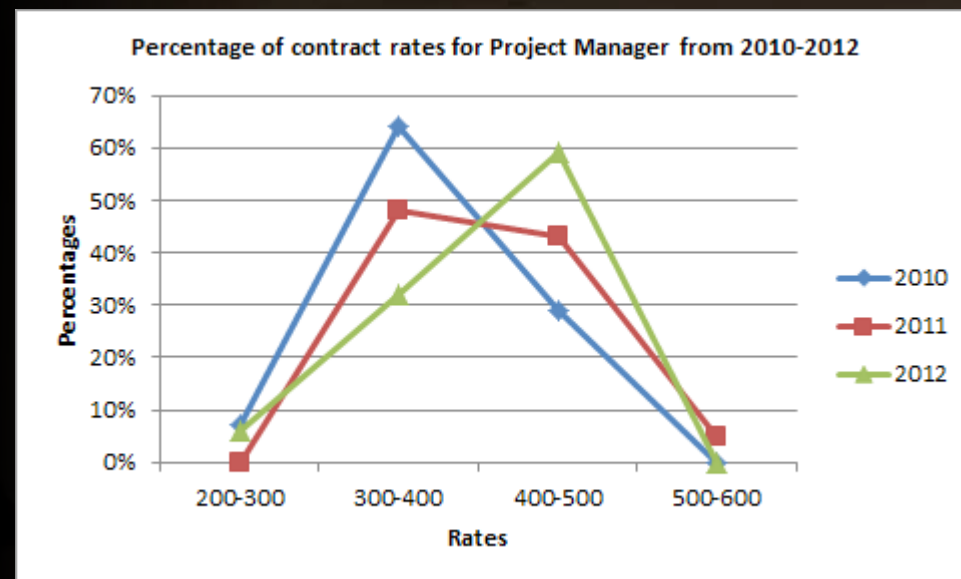
Business Analyst

This is the category in our survey where demand and rates appear to have remained most consistent over the 3 years surveyed. Year on year the key demand areas appear to be for mid-range to senior Bas, in the 3-400 and 4-500 day rate range, with little or no demand at the lower and higher levels. There is some movement downwards on day rates during 2012 with a reversing of the 40% demand in the 3-400 range and 50% in the 4-500 range, which may reflect some movement in supply and demand in the broadcast sector with the planning phase of many of the major projects over the period surveyed being primarily during 2011. However the market for good contract Bas remains buoyant in our view as the industry continues to invest in complex new infrastructure and systems, whilst maintaining the need to continue to integrate with existing services not yet ready for end of life.



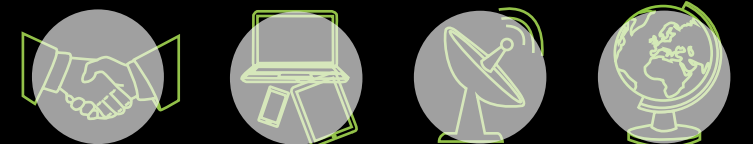
Project Manager

Average rates for contract project managers moved up significantly over the period of the survey, from an average of 3-400 during 2010 to 500+ during 2012, probably again reflecting the very major projects going on in the industry from the end of 2010 through to the latter part of 2012. Permanent salaries have tracked this upward movement, with more than 50% of perm PMs appointed in 2012 coming on board at upwards of 65k compared to an average rate of 50-55k during 2010 and 2011. From speaking with candidates this reflects some move from temp to perm, partly due to the uncertainty of the contract market post late 2012, as well as confidence returning to clients to bring in senior pms to lead on projects, as they return to investing in their businesses.

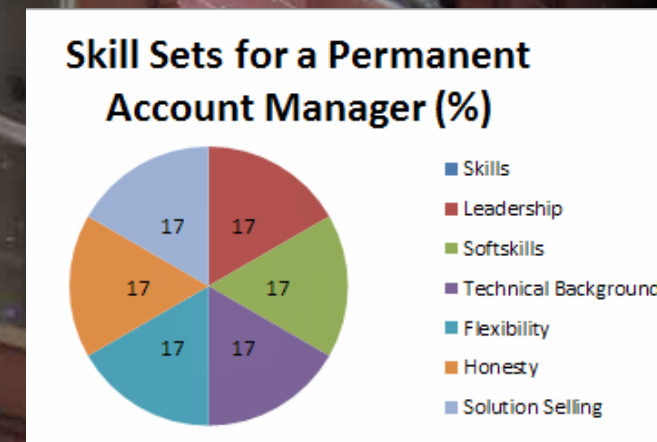
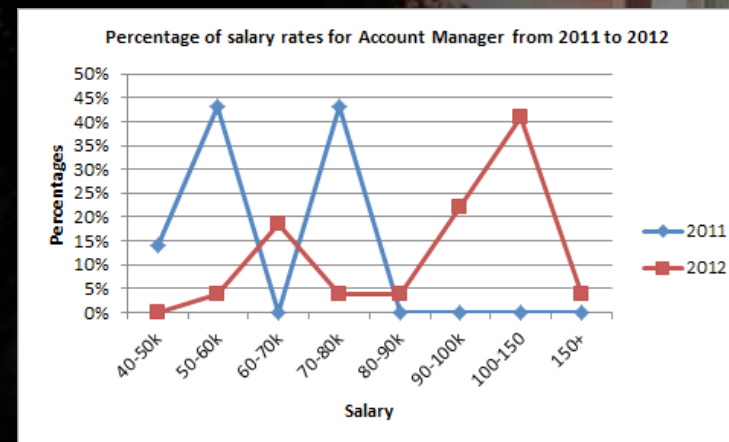


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The Commercial Sector



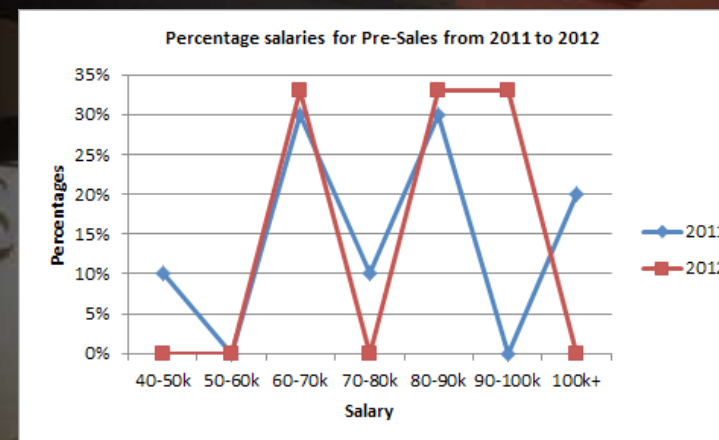
Account Manager



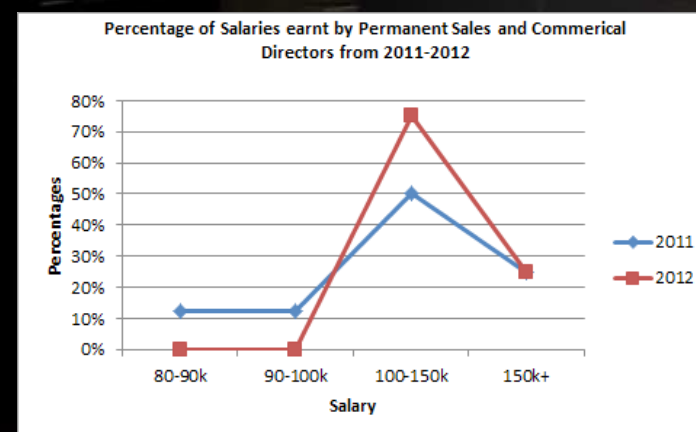
All three of the positions tracked in our survey reflect that both the demand and rewards available to the key sales roles have increased over the period – most significantly average salaries for account managers moving from between 60 to 80k during 2011 up to around the 100k mark in 2012, probably reflecting the continuing building up of sales forces across EMEA resulting in increased competition to secure the best available. Top-level salaries for Sales and Commercial directors appear to have remained in the 120-150k range, however again between 2011 and 2012 the percentage being appointed in the upper part of the range has increased. On the pre-sales side, again the average appears to have moved slightly upwards over the 2 years, although fewer positions were available at the top salary ranges in 2012 than in 2011.

PCR's focus on commercial roles (sales and marketing senior management positions) covers primarily pan-European permanent positions in companies that are key suppliers and partners to corporations within the broadcast and digital media industry. Unsurprisingly, as companies in the sector return to making capital investments in their business this market segment has again become fairly buoyant overall, with the first signs of green shoots emerging at IBC in September 2010 – for the purposes of our survey we have therefore examined specifically the trend over the two year period since end 2010.

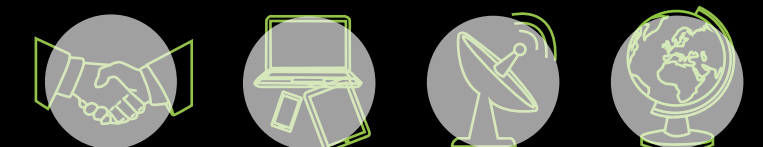
Pre-Sales



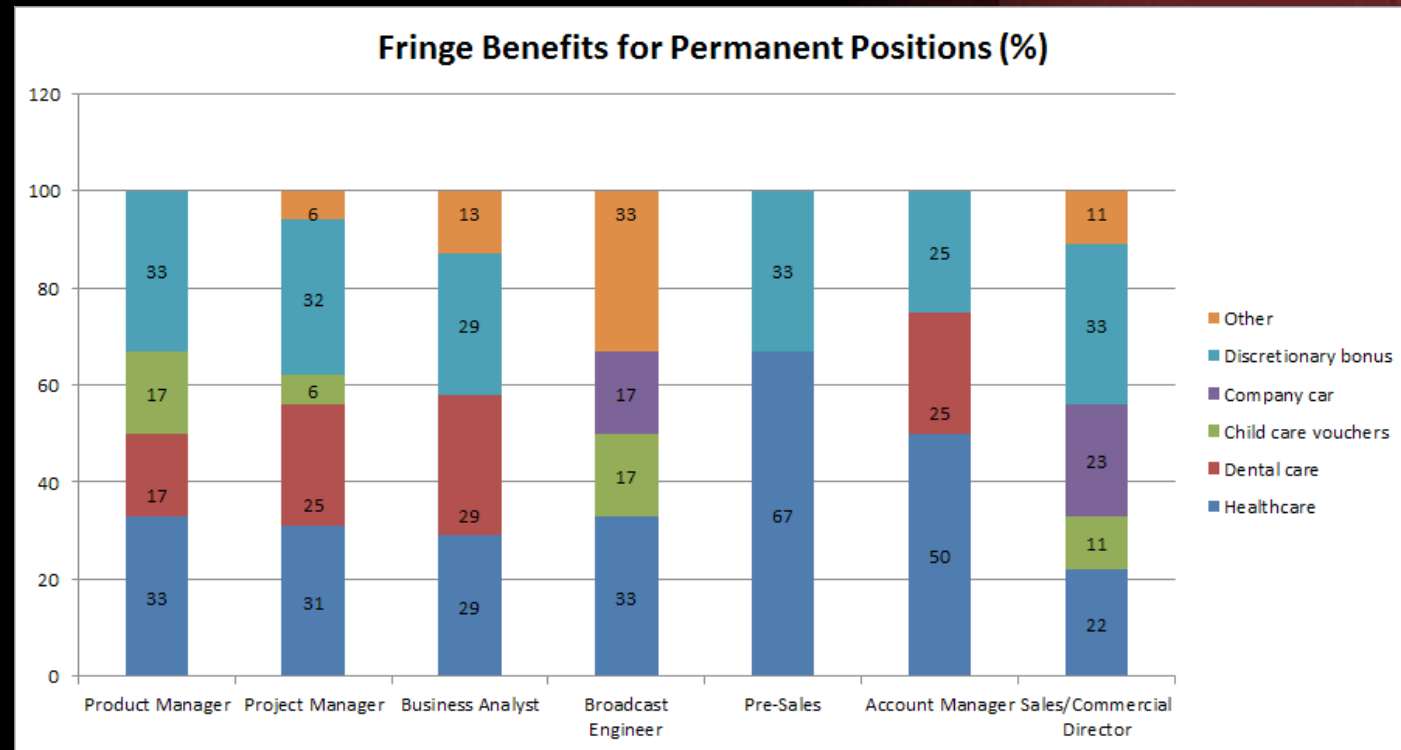
Sales and Commercial Director



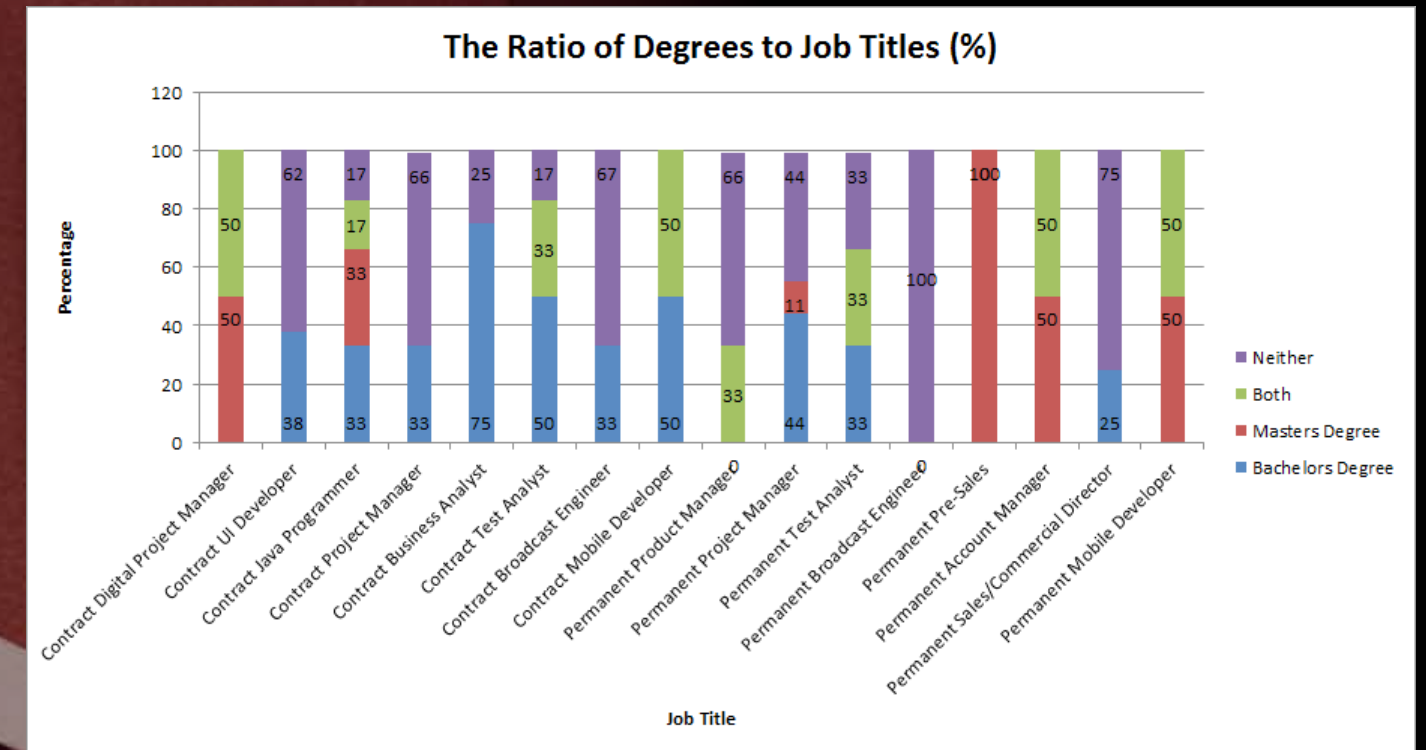
It will be interesting to continue to monitor the trends in the same group of positions over the next period, particularly to see whether all of the merger and acquisition activity in this sector of broadcast and media results in consolidation and potential over-supply in the market.



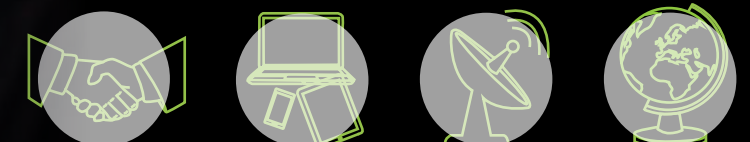
Other Findings



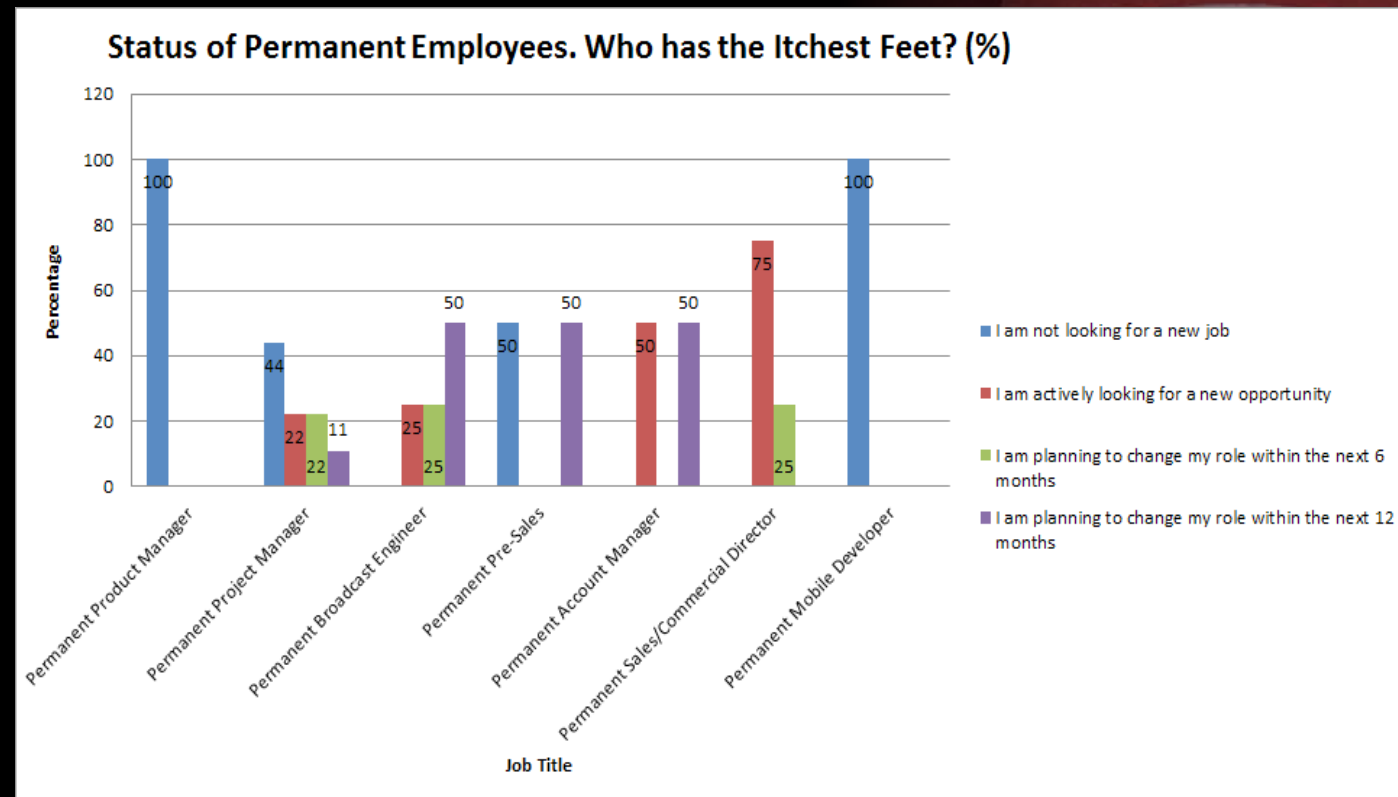
Sales and commercial positions attract the most fringe benefits. The graph shows the differences between job roles even in the same sector. The most common benefit is healthcare where, interestingly, every permanent role that we examined over 20% of primary research respondents said they received it as a fringe benefit.



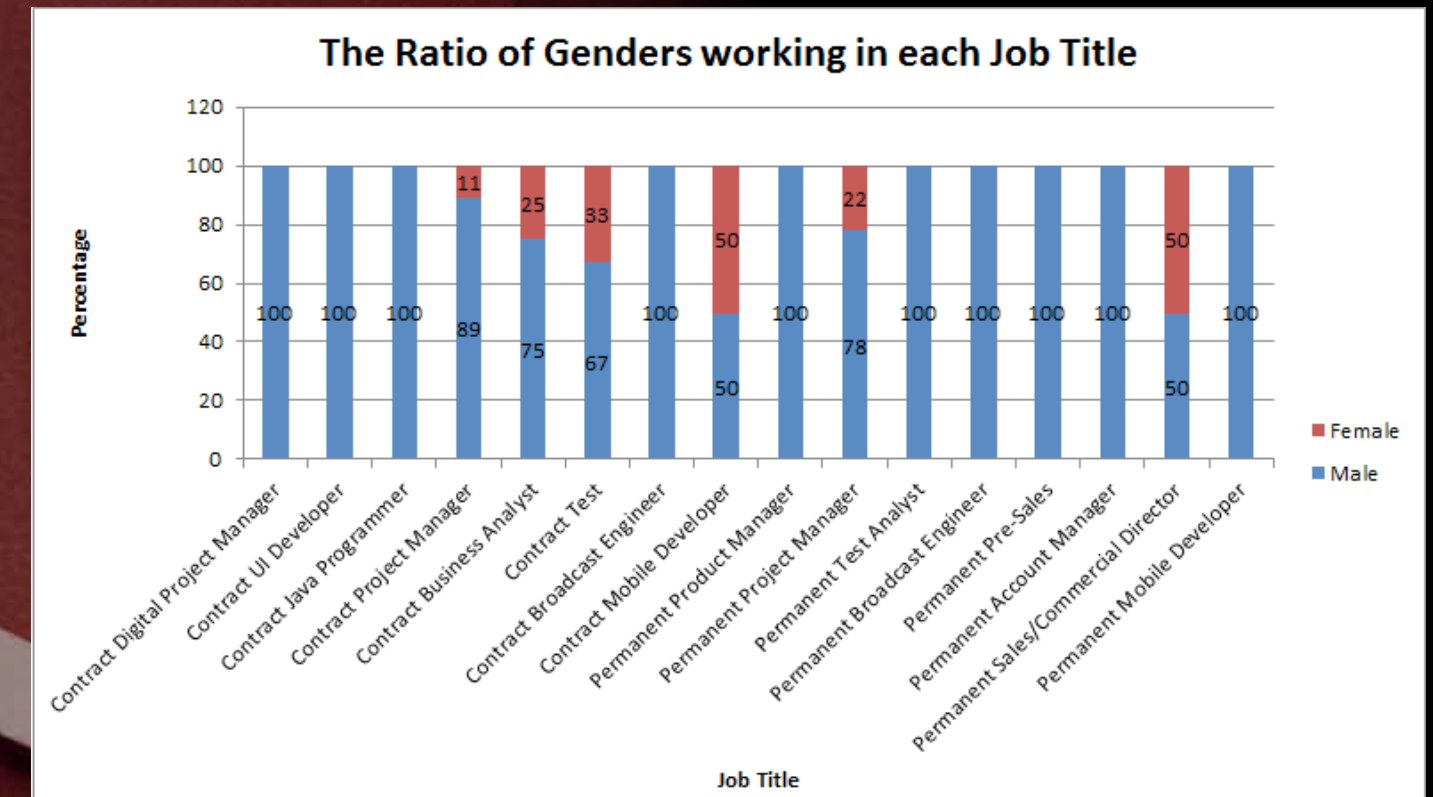
From the responses to our survey, it appears that at least a first degree is a prerequisite for professional positions in the sector, with only a number of comments from responding broadcast engineers questioning the relevance of a degree level qualification for their chosen field. Recent announcements of an apprentice scheme to fill gaps in this area, sponsored by some of the leading broadcasters and play-out companies in the UK, may well change this picture in the near term.



Other Findings

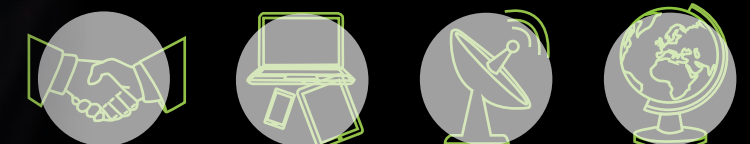


To answer our question: the commercial sector employees appear to be always on the look out for new opportunities. Whereas on the technical side, particularly permanent roles that we examined, project managers seem happy where they are: with 44% not looking for a new opportunity. Neither product managers nor mobile developers seem to be planning to move jobs, which could be caused by their salaries steadily increasing in the last few years.



From looking at the gender ratios in all roles examined, we can see that males dominate in all titles- except contract mobile developer and permanent sales/commercial director where the ratios are equal.

It is interesting to see that only 38% of roles had a female response from our primary research, and the majority of these roles are contract.



Thank you to all those who participated in our survey, and to you for reading it: we hope you find it as interesting as we did compiling the results.

If you have any comments or queries then please do not hesitate to contact us:

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