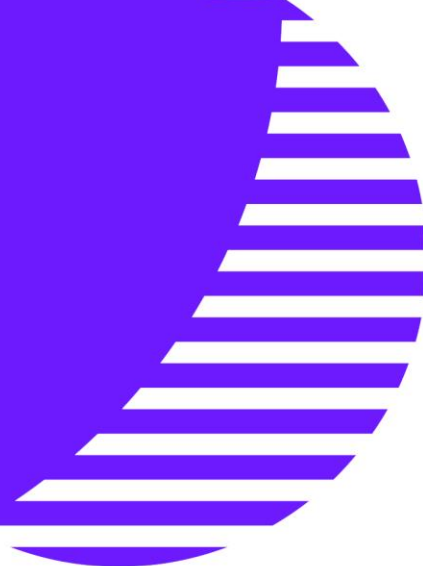


REPORT – SEPTEMBER 2019



HUMAN CAPITAL IN THE DIGITAL ENVIRONMENT

2019

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EXECUTIVE SUMMARY



The second edition of the annual IAB Europe Human Capital in the Digital Environment Report highlights a series of findings which come to support the efforts of the industry to combat the skill gap and talent shortage currently affecting it.

Based on a survey developed under the guidance of the IAB Europe Education & Training Committee in concert with the IAB Europe Research Committee, the report covers a series of critical areas of the digital training and human capital in the online ecosystem, identifying:

- the primary training needs of both employers and candidates
- challenges faced by recruiters of digital talent
- challenges that the candidates looking to enter or advance in the digital field have to overcome
- specific skill gaps in today's digital landscape

Respondents to the survey representing employers and training specialists come from a wide range of organisations and cover the full hierarchical spectrum within them. The overwhelming majority of the respondents have local remits and an intimate knowledge of the markets they operate in.

Employers continue to focus recruitment on technical roles, with programmatic and analytics the most sought-after skills (59% and 51%, respectively), followed by social media positions and cross-media (44% and 43%, respectively). They also put stock in teamwork and communication abilities, as well as project management abilities.

The main barrier to recruitment in digital is by far the shortage of available talent (75% of respondents having marked this as critical). This is followed by the salary expectations of candidates that do come forward (cited as a main hurdle by 54% of respondents). A smaller pool of available candidates translates into a greater demand, which, in turn, means that those candidates who do pass the scrutiny of recruiters, have high salary expectations.

Where does the shortage stem from? Several fingers are pointed at the formal education system. It is reasonable to point out that the formal education system in many countries seems to not be in line with the rigours of an increasingly digitised society. This means that the strong foundation on which specialised verticals can be built is absent or insufficiently sound.

Ultimately this translates into a mis-use of resources, as those professionals who could best use their limited time to specialize, often have to go through fundamental training instead of taking focused courses.

On the topic of barriers, this report also draws on the findings of the recently published 2019 [Attitudes to Programmatic Advertising Report](#) which looks at the main barriers to programmatic adoption. 43% of agencies, 48% of publishers and 45% of ad tech providers cite hiring people with the right skill set as a barrier to programmatic adoption.

Training levels within companies are not spectacular, for either junior- or senior-level staff with the majority of respondents reporting that only fewer than 30% of the employees in their organisation have received training in the past 12 months. The outlook on training budgets is not particularly bright either. 44% of respondents are optimistic about budgets growing, whereas 30% estimate that training budgets will stagnate.

Potentially as a result, the appetite for training remains high, with over 90% of respondents willing to take courses, even if they have to pay out-of-pocket for them.

In terms of skills, employers and candidates are largely aligned. Programmatic and analytics rank highest

on the list of what candidates believe employers are most interested in (55% and 51%, respectively). Soft skills also sit on a top position (41%), again reflecting the needs expressed by employers.

Recruitment channels are dominated by LinkedIn (32%), followed by employment websites and job portals (26%), and internal referrals (20%).

75% of respondents see the appeal of having candidates hold a pan-European certification, with 55% of them supporting the idea of introducing such a certification as a requirement in the recruitment process appeals, provided issues tied to localization and market specificity are taken into account and solved.

Candidates looking for a position in digital or transitioning to a new, more specialised role, are overwhelmingly graduates of university studies, with close to 45% of respondents in this section also boasting post-graduate studies.



The findings of the Human Capital in the Digital Environment report once again reinforce the acute need in the industry for better and more sustained efforts in training and education. It is a call for closer cooperation and cross-support between all players to develop European programmes which help close the skill gap and ensure a thriving digital ecosystem.

Students and recent graduates are the future in more ways than one. They are the solution for the current shortage of digital talent and the key for a more efficient industry moving forward. While in the short-term there is not much that we, as an industry, can do to reshape education systems across Europe to better cater to a digitised world, we can - and must - support students by raising their awareness of the opportunities digital advertising presents and the skills needed to capitalise on them.

TOWNSEND FEEHAN, CEO, IAB Europe

1. METHODOLOGY

This is the second edition of the Human Capital in the Digital Environment report published by the IAB Europe Education & Training Committee (ETC).

Driven by the IAB Europe National and Corporate members and devised by the ETC with support from the Research Committee, an online survey was used to collect responses and ensure a sufficiently representative sample across all European markets.

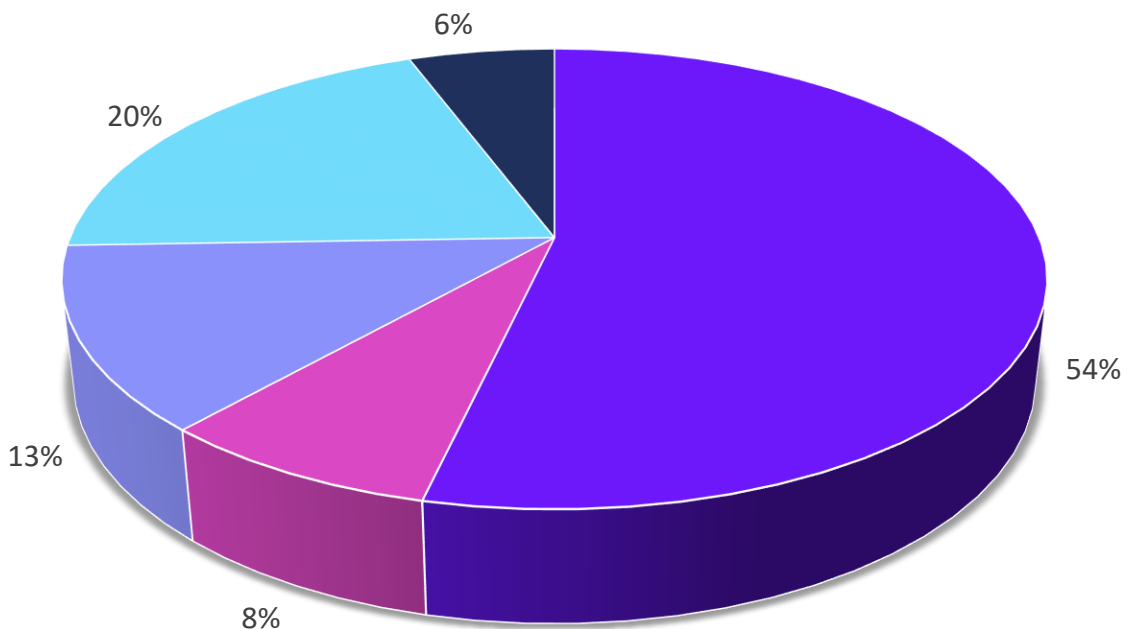
The survey saw a significant increase in the overall number of respondents, to an encouraging 454 up from 290 in 2018, a 57% hike. The responses were collected from June through August.

The responses came from trainers, HR

specialists as well as employees and candidates from 28 European markets, but we have also seen responses from Asia and the Middle East. The respondents had both pan-European and Global remits. Some of the main respondent pools are listed in the chart below.

The overwhelming percentage of responses (94%), however, came from trainers, HR specialists and management with local remits and intimate knowledge of their local markets. The two strongest respondent pools were located in France and Poland, which provided an interesting analysis opportunity by segmenting on regions driven by these two poles: CEE and SE, and Northern and Western Europe.

Respondents based on remit and/or country of residence



■ CEE ■ Northern Europe ■ Southern Europe ■ Western Europe ■ Multi-country remit

2. EMPLOYERS

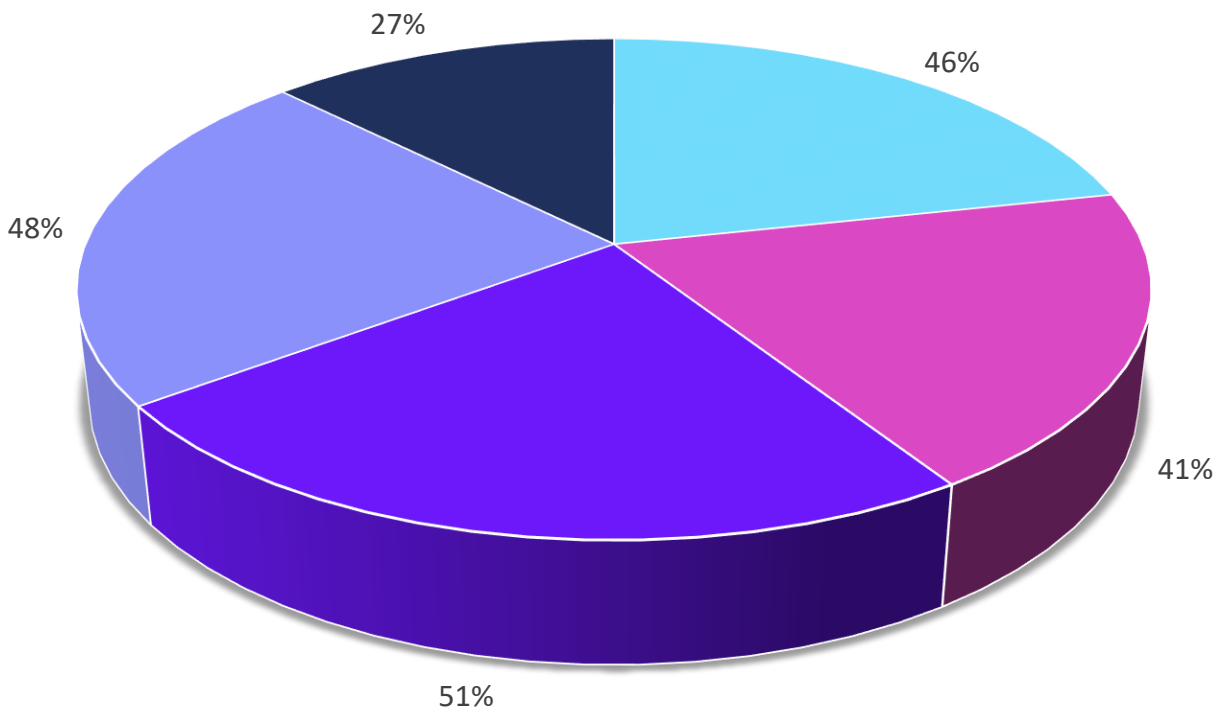
With a cross section of respondents including C-level management as well as professionals in charge of recruitment, training, and assessment, the employer end of the spectrum was well represented in the survey carried out by IAB Europe.

The organisations ranged from publishers to tech companies, but also included FMCG, gaming, cosmetics, as well as legal and financial organisation.

The candidates cohort represented 34% of the total number of respondents.

Most respondents from Northern and Western Europe had responsibilities in the recruitment and selection of personnel (66%), whereas those from the CEE and Southern Europe region where mainly trainers and instructors (48%).

Respondents based on responsibility



- Recruitment and personnel selection
- Employee evaluation
- Training and development
- Middle-management
- C-level management

2.1 FOCUS AND CHALLENGES

The initial focus of the survey was to identify those areas within participating organisations that saw most recruiting over the last year.

In line with the results of the 2018 report, the overwhelming (59%) efforts of recruiters in the field of digital have been concentrated in the past 12 months on **online marketing positions** including, but not limited to, mobile marketing, pay-per-click, SEO optimization, email marketing, content marketing, and analytics. This marks a hike from 2018 when the same area of interest for employers was cited by 49% of respondents. There is very little difference from one region to the other in this respect.

Marketing and communication strategy also remains in focus, with a significant proportion of respondents (37%) seeking out candidates for such positions, similar to the value recorded in 2018 (36%). **Social media** was referenced as yet another significant field for which recruiters sought personnel in the past 12 months (36%), ten percent higher than last year.

Unsurprisingly, technical roles saw interest from recruiters with **ad ops** and **programmatic** at the forefront of efforts to recruit skilled personnel – 20% and 35% respectively. If recruitment for ad ops positions seems to have held steady compared to last year, programmatic focus has gone up by 7%.

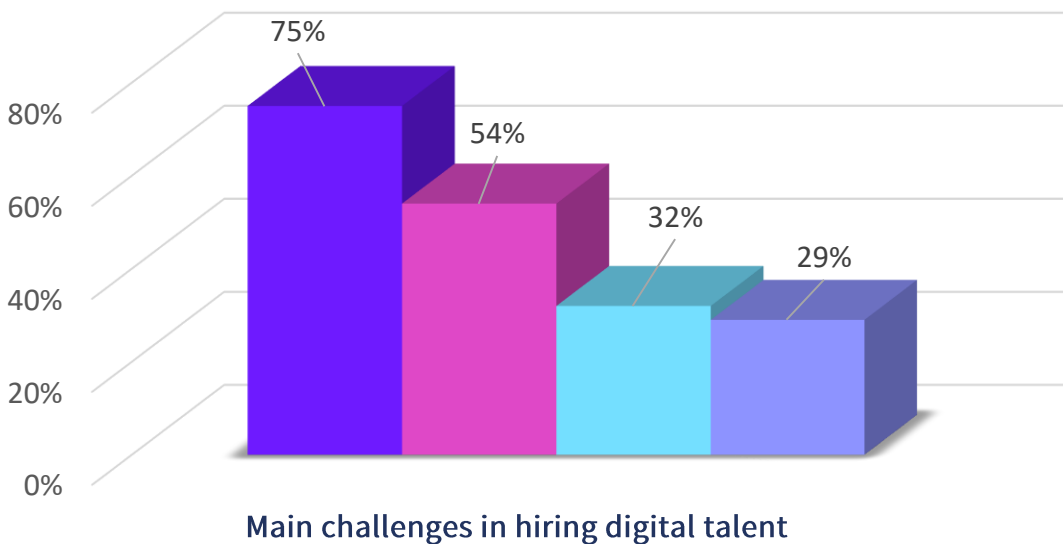
In 2018 we looked at the IAB Europe Attitudes to Programmatic Advertising Report to get a clearer understanding of how hirings in programmatic shape that landscape. We saw then a shift, noticeable mainly in the case of advertisers, in the growing importance of training versus

hiring. Furthermore, training in programmatic was cited as a barrier to programmatic investment in the same report.

The 2019 **Attitudes to Programmatic Advertising Report** (available [here](#)) shows that hiring people with the right skillset in programmatic trading has decreased as a barrier for advertisers from 32% in 2018 to 24% in 2019, while it continues to constitute a significant barrier for other stakeholder groups. In fact, 43% of agencies, 48% of publishers and 45% of ad tech providers cite hiring people with the right skill set as a barrier. In the case of agency employers that is a significant spike from only 26% of them identifying the shortage of qualified programmatic specialists as an obstacle in 2018.

Training staffers adequately, the same report shows, is also a concern, with 33% of advertisers, 42% of publishers and a significant 53% of agencies citing this as one of the top three barriers to building an in-house programmatic strategy.

This comes to corroborate the findings of this report, though it is no surprise, that the shortage of talented professionals in the digital environment in general is an acute problem. The fact that programmatic permeates most of what is today digital advertising and marketing means that key positions and operations can be affected, and that opportunity for growth, driven by specialists in a given field is slowed, particularly for those players looking to move operations in-house. **Unfortunately this is in no way isolated to programmatic alone**; the skill gap impacts nearly all areas of the ecosystem.



- There are not enough eligible candidates for this specialization on the market
- The salary expectations of the candidates are higher than the salary budgets of the companies
- Most candidates incorrectly understand the job's profile for which they are applying
- Most candidates incorrectly self-assess their abilities and skills necessary for the job they're applying to

Our survey then looked at the main challenges that employers have to overcome in their pursuit of new digital talent.

As previously mentioned, of the challenges cited by employers, the **shortage of eligible candidates** stands out. It was identified by 75% of all recruiters as the top hurdle to overcome in the hiring process. The severity of this finding lies in the fact that despite the general awareness of the skill shortage on the digital advertising market, very little headway has been made in offsetting it. Employers seem to be struggling with this regardless of European region. In fact, the percentage of recruiters

citing the lack of available talent ranges from 71% in CEE and SE countries to 78% in Northern and Western Europe.

We will see later on that candidates are more than willing to take courses and follow training programmes, so why then this acute shortage of qualified personnel? For one, it might be the lack of high-quality training programmes. The list of trainings and courses that the candidates cite in one of the survey questions in the section dedicated to them is not particularly long or diverse. It's largely comprised of the same (big) names over and over again.



No matter how good the programmes are, having just a handful of them will not be sufficient to offset the skill gap. As we noted last year as well, the speed at which the industry evolves and the constants breakthroughs and developments, make it very difficult for any one course or programme to be sufficiently exhaustive and relevant. **Many of the skills required by recruiters are niche skills, while many of the courses available are quite broad in their approach.**

Perhaps one of the most relevant comments of last year, which has also been reflected this year is a “poor education system that does not prepare students for the digital industry in the digital age”. It is in this that **the key to solving the shortage of digital talent** lies, as responders showed. Having a formal education system that covers the fundamentals or using the private general courses and trainings to target students rather than professionals is a critical first step. If the next generation of digital talent has a strong command of the basics, the niche skills can then be developed through focused training, much faster and more efficiently. As responses have shown for two years now, this may very well be the root cause of the 75% of employers whose main barrier to recruitment is the shortage of eligible candidates.

In today's fast-moving extremely busy

environment, setting time aside to study is a time-investment that poses difficulties for both employer and employee. Maximising the return of the time investment is paramount. If time were spent specialising through very focused, very in-depth courses, the industry would have a better trained workforce, one that would find it easier to keep abreast of developments. A very strong foundation is needed for this.

Interestingly, another aspect that undermines the efforts of organisations to secure a sufficient and competent roster of employees on digital, seem to be the HR departments themselves. More than one manager has highlighted that “HR departments do not really understand the hard and soft skills required for the job and don't depict them correctly in job ads”. This lack of clarity generates a **poor understanding the job profile** on the part of candidates creating problems for 32% of employers.

Some candidates, according to respondents, are simply not business-focused, and fail to understand the needs of the employer, while others rotate too frequently between companies, which to some employers equates to lack of involvement and professionalism, but also insufficient time spent on becoming a better-skilled digital professional.



Employers and candidates, the Human Capital in the Digital Environment 2019 Report shows, are aligned in terms of priorities. Candidates are more than willing to receive training and it is our mission as an industry to support them in their efforts. A wider range of programmes, covering not only fundamentals but also specialisations from within programmatic or analytics will help offset the skill gap and increase efficiency in digital advertising.

The IAB Europe Education and Training Committee will continue to support private and national initiatives that work to close the skill gap through guidance, insight and visibility. It will continue to leverage its Endorsement Programme and develop courses in concert with the other IAB Europe committees and leading experts in the market.

NESLIHAN OLCAY, CEO, Wavemaker Turkey, and Chair of the IAB Europe Education & Training Committee

The issue of the shortage of skilled professionals is compounded, according to our survey, by **the salary expectations of the candidates**. It is basic economy; supply and demand. Highly-trained candidates know full well just how in-demand their particular skill-sets are, and have high salary expectations, which not all organisations are willing *or able* to meet.

For large groups and companies in the ecosystem, and perhaps even for the general public, this may come as a surprise, yet this is the second year in a row that has employers mark this as a barrier to adequate staffing levels.

Salary expectations as a barrier to recruitment is not isolated to countries in CEE and Southern Europe where 53% of respondents identified it. In fact, it seems even more acute in countries from Western and Northern Europe where **the percentage of respondents was a massive 68%**. The only outlier from the Western region was France, where only 41% of respondents see salary expectations of candidates as a hurdle.

The other shift from last year is the **inability of candidates to self-assess accurately**, which was one of the main issues recruiters seemed to flag in 2018, and is now relegated to the fourth spot on the list of the main challenges when recruiting digital talent, with only 29% of all recruiters citing it.



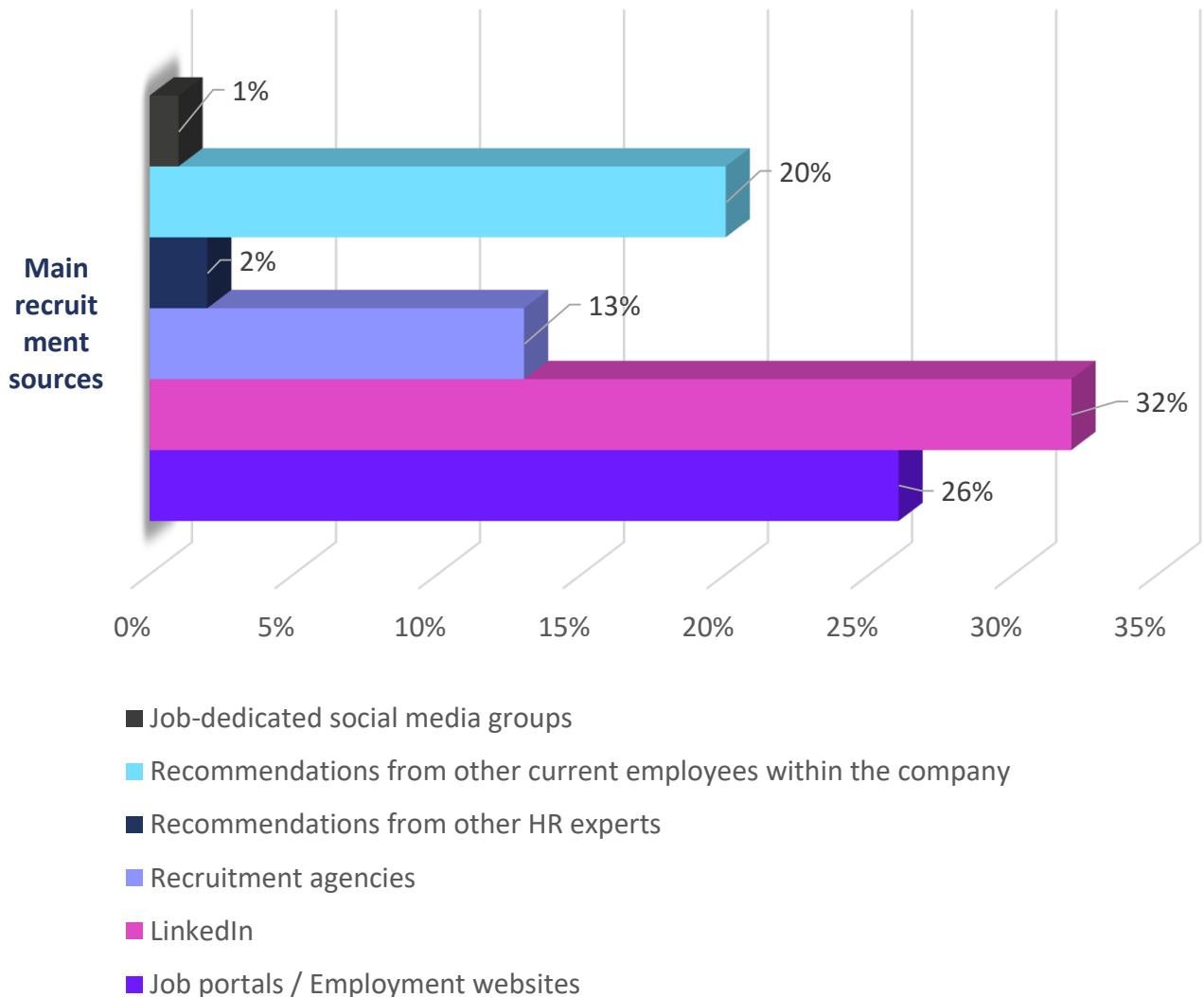
2.2 SOURCES AND TRAINING

In terms of recruitment channels, the main source of potential new hires is **LinkedIn** (32%) ahead of job portals and **employment websites**, relied on by 26% of respondents.

This marks a slight shift from 2018, when LinkedIn was still regarded as a more important source of candidates than dedicated job-posting websites, but trailed references from current employees by 4% (Referrals 31% - LinkedIn 27% vs Referrals 20% in 2019).

Recruitment agencies and head-hunters still sit in the middle of the pack (13% in 2019, 12% in 2018), but a potential explanation for this could be that they mainly recruit candidates for mid and upper management positions.

Last on the list are social media job-dedicated groups and referrals from other HR experts.

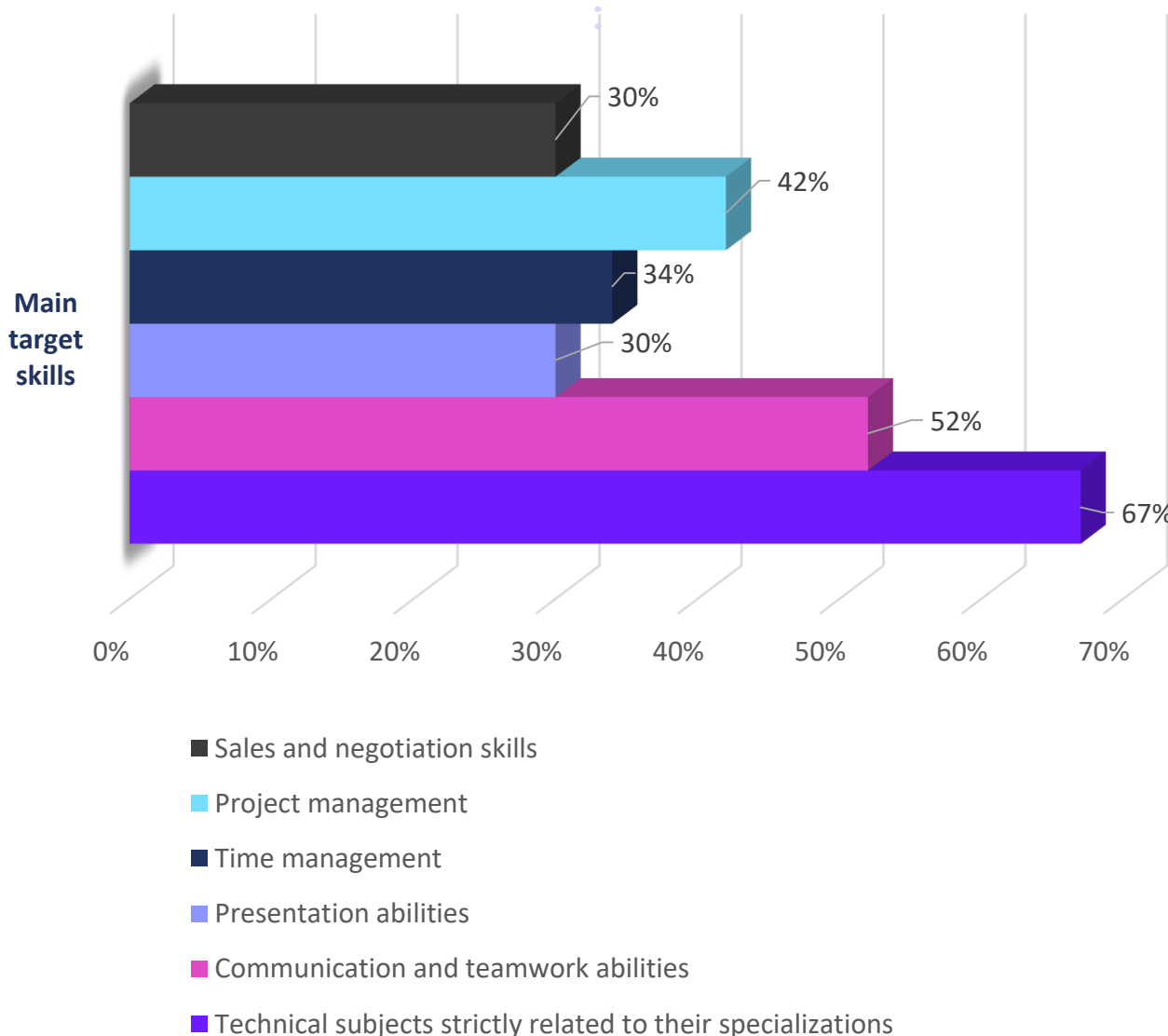


Discussing the type of abilities most sought-after by employers, it comes as no surprise that on top come **technical subjects related to the position candidates are applying for** (67%). In line with last year's results, a relatively close second are soft skills such as **communication and teamwork abilities** (52%), with **project management** knowledge in third (42%). A combination of the three is, of course, the holy grail for any recruiter.

As mentioned above, this result in terms of the main target skills for employers are very much aligned to the responses collected last year, with no variation in

responses above 5%. This holds true for the other cited abilities, with the only change from last year marked by presentation skills which saw a 7% drop from 2018.

Other in-demand abilities are social and emotional intelligence, the capacity to provide a holistic dimension to services rendered, and product management. Knowledge of the ecosystem is also mentioned as a must.



Considering that the technical knowledge and skills of candidates hold the most sway in the hiring process, what are the **main topics that employers identify as critical** for both potential new hires and existing staff?

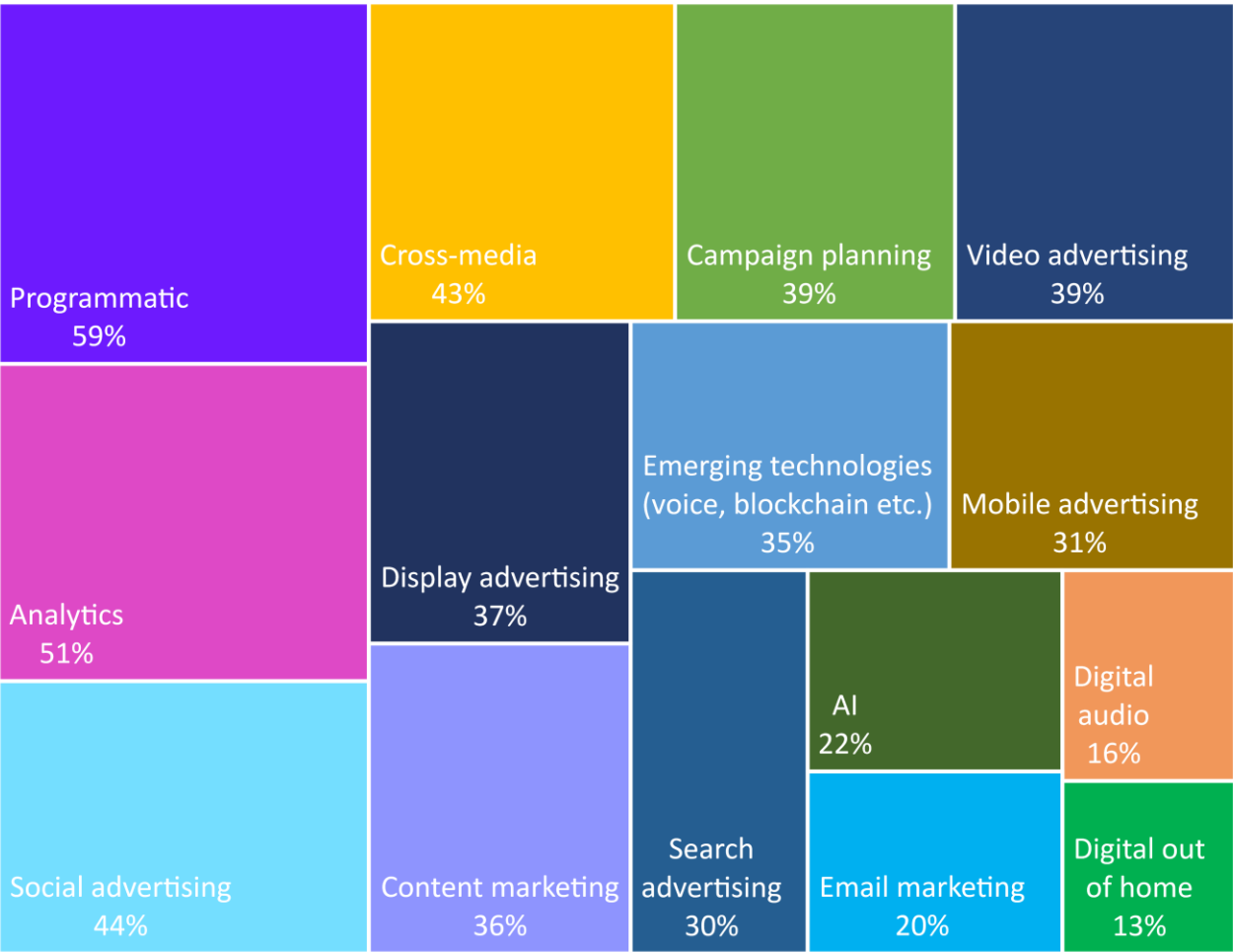
Programmatic trading and **analytics** lead the field – 59% and 51%, respectively. Also of note are topics related to social media advertising (44%), cross-media (43%), emerging technologies (35%), and campaign planning (39%). At the other end of the spectrum lie topics such as email marketing (20%), digital audio (16%), digital out of home (13%).

Compared to last year, the most noticeable change is the 9% drop in focus on video advertising (down from 43% in 2018) and

the rise of **social media advertising**, which rose by 10% from 2018. Otherwise, the main topics of interest remain the same.

However, it is interesting to note how these topic of interest shift from Northern and Western European countries to those in Central and Eastern Europe and Southern Europe, with the main difference on the weight of **video advertising**. For both cohorts Programmatic is the number one priority, with more emphasis in CEE and SE countries (60%) compared to NE and WE countries (50%). Analytics is also consistently identified as the second-most important training topic.

Main training topics recruiters are interested in



Today's children are born with a tablet in their hand - they are born "digitally ready". The young generation adopts, understands and uses technology at a more rapid pace than advertising and marketing can adjust. But those who have the tech skills in their DNA and high digital abilities lack the overall understanding of business, context and economic environment. And those who understand all that, lack the digital skills and readiness. This is where education programmes should close the gap.

Lack of a strong formal education system in digital leads to bad budget investments, foul regulations, no transparency on the digital advertising chain, slow business progress and weak tech adoption.

IOANA ANESCU, General Manager, IAB Romania

In Northern and Western Europe, video advertising ranks as the second most important topic that existing and future candidates should have command of, on equal footing with Programmatic and Analytics. In CEE as well as Southern Europe, the focus on video slips to only 36%.

Another interesting difference lies with Emerging technologies. If in the north and west of Europe 42% of employers regard this as a topic of interest for training and as a skill required for both candidates and employees, in Central, Eastern and Southern Europe emerging technologies such as voice and blockchain are cited by 10% fewer employers and trainers among the priority training topics.

We have also asked employers what are **the main specialisations that candidates apply for** when seeking a job in their organisation. For the top two training topics that they identified, the actual

percentage of candidates applying is quite low.

- **Programmatic** – 37%
- **Analytics** – 32%

Other ad ops and technical roles applications are seen by employers only 28% of the time. Most candidates that apply pursue **social media** roles and **marketing strategy** (52% and 46%, respectively).

This comes to reinforce the findings we highlighted earlier which marked the shortage of available talent for key positions as the number one hurdle that employers have to overcome.

Other topics that were not included in the original multi-choice list, but have been mentioned by respondents, include gaming and e-sports, digital strategy, digital talent acquisition, affiliate marketing, and media buying.



Delving further into the topic of training within organisations, we asked about the **budget that was allocated last year** for **junior employees** in the respondents' organisations. 25% indicated that over EUR 200 / employee was spent on training, while 25% declared a value of under EUR 100 / employee earmarked for the training and onboarding of junior staff.

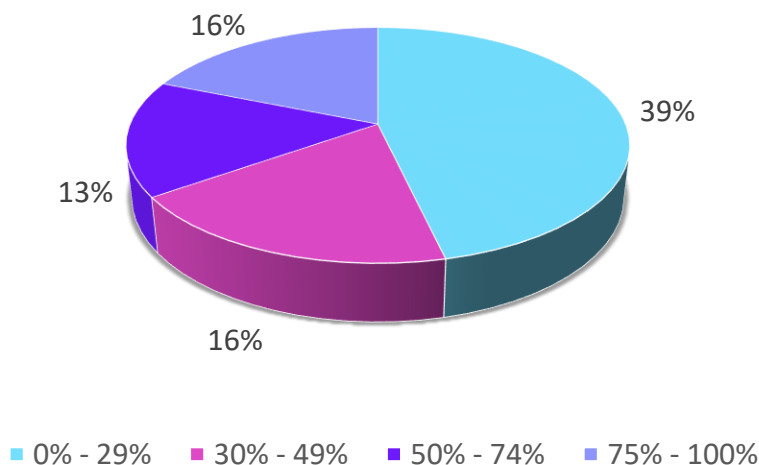
Insofar as the actual number of junior staffers trained is concerned, 39% of respondents indicated that under 30% of juniors are receiving training, with only 16% of the survey takers stating that over 75% of their juniors are receiving training.

The situation is not significantly different

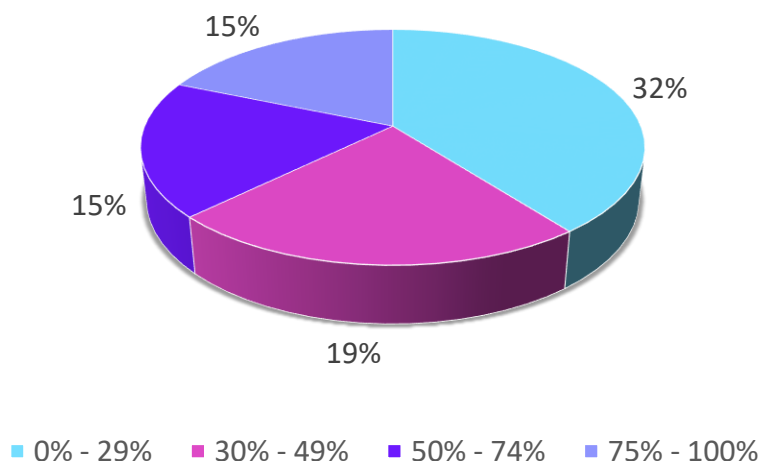
in the case of **senior staff**, who received training in excess of EUR 200 / employee according to 30% of respondents, but with only 15% reporting that over 75% of their senior staff received training. 32% of respondents highlighted that under 30% of their senior received specific training last year.

Overall, however, we have seen a slight dip in the overall reported percentage of staffers receiving training, considering that in 2018 32% respondents reported a low number of trained junior staffers, a percentage which rose to 39% in 2019. A similar situation though an increase of just 2% is also true for the training of senior-level employees.

Percentage of JUNIOR-level employees benefiting from training in the past year



Percentage of SENIOR-level employees benefiting from training in the past year

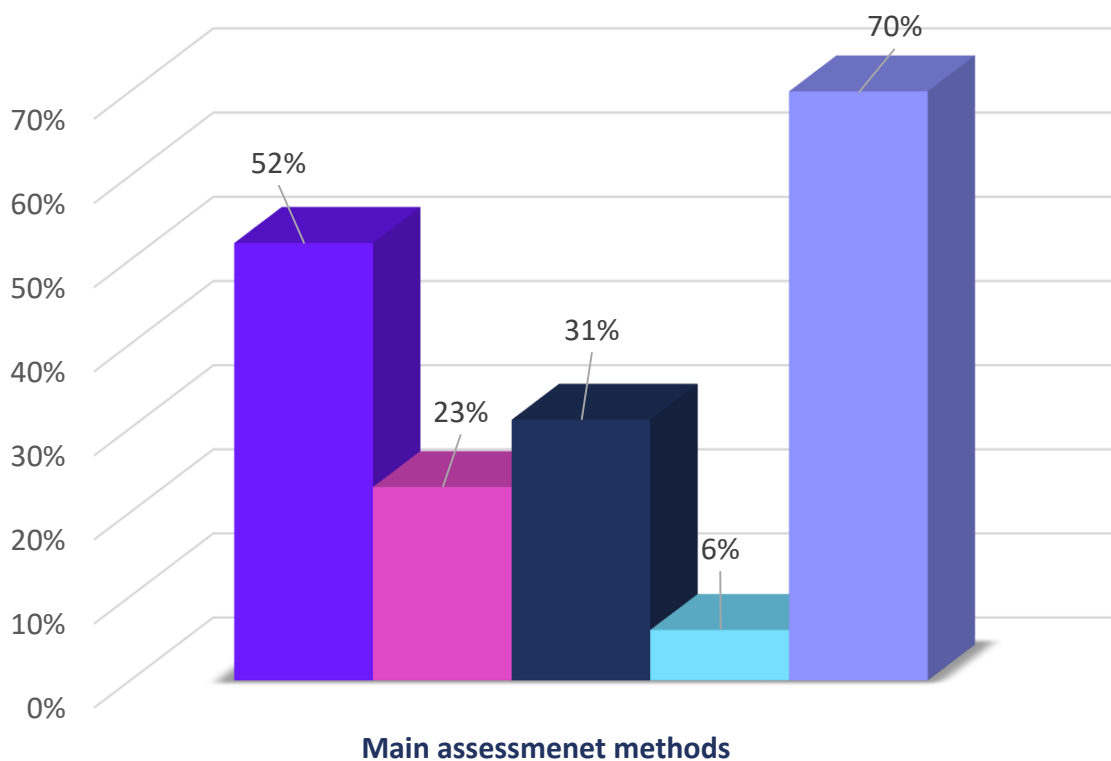


The outlook on training budgets is not particularly bright either. 44% of respondents are optimistic about budgets growing, whereas 30% estimate that training budgets will stagnate.

The **main tools employed by recruiters in hiring new staff** are situational interviews (70%), followed by technical tests specific to the position (52%), and courses, trainings and programmes graduated outside the formal education

system (31%). The latter saw a 5% rise from 2018.

On the following page we will look at what could be a potential additional criterion in the recruitment process: a pan-European certification.



■ Evaluation tests for specific knowledge

■ Formal education diplomas

■ Individual studies (Trainings, courses, accreditations outside the formal educational system)

■ IQ tests

■ Situational interview

With several organisations running **certification** programmes, some of which are members of IAB Europe, this is certainly a topic that was imperative to be covered in the survey. Like last year we aimed to test the feasibility and applicability of a *pan-European* certification. Asked whether such a certificate would be considered an important asset for an applicant, **75% of recruiters and trainers answered yes**. This is a 6 point hike from last year, and shows that although ambitious and an intricate process to implement, a continental certification introduced cohesively by the IAB Europe network would certainly be interesting for a significant percentage of employers.

For those not looking at such a document as a valuable addition to the application dossier of a candidate, most flagged their apprehension on the basis of the fact that certification programmes already exist and that such a document is not really hard proof that its owner is able “to use the knowledge they possess in real life tasks”. The differences between markets is also seen as a hurdle for such a pan-European certification.

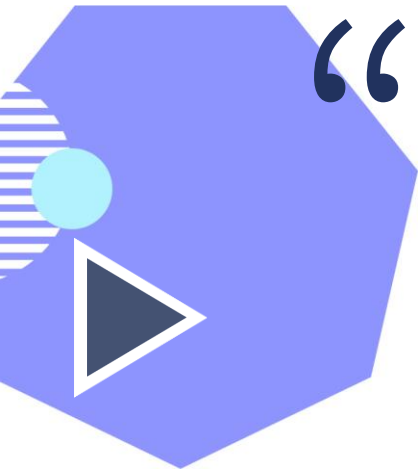
Are these reservations anchored in a misunderstanding of what a pan-European certificate based on a professional standard could mean for the industry? It remains to be seen should such a

certification be put in place and better explained.

The fact remains that even at this purely theoretical stage, 55% of respondents would consider including such a certification as a requirement in the recruitment process for certain positions and almost identical value recorded in 2018 for the same question.

Some of the reasons quoted for not requiring such a potential certification, are the risk of limiting the availability of good candidates in an already talent-deprived market and the need to have concrete, “hands-on” experience rather than a certificate attesting skills. Price was also flagged as a concern

71% of respondents deemed this a valuable asset for an employee in digital and could see budget being allocated to certify existing staff.



Entering one of the fastest growing industries is one of the best options available today for graduates as well as those who want to retrain. And it has one more thing going for it - there aren't any strict entry limitations for those who want to become digital marketers. To start your adventure in this field you don't have to hold any kind of specialised degrees.

From the employers' perspective, skills matter most, therefore certification programmes are a real alternative to university degrees as companies realize that they need people who truly understand the industry. Certifications also usually require continuous development and constant update in order to remain valid so ongoing training is a must.

EWA OPACH, Education and Certification Director, IAB Poland

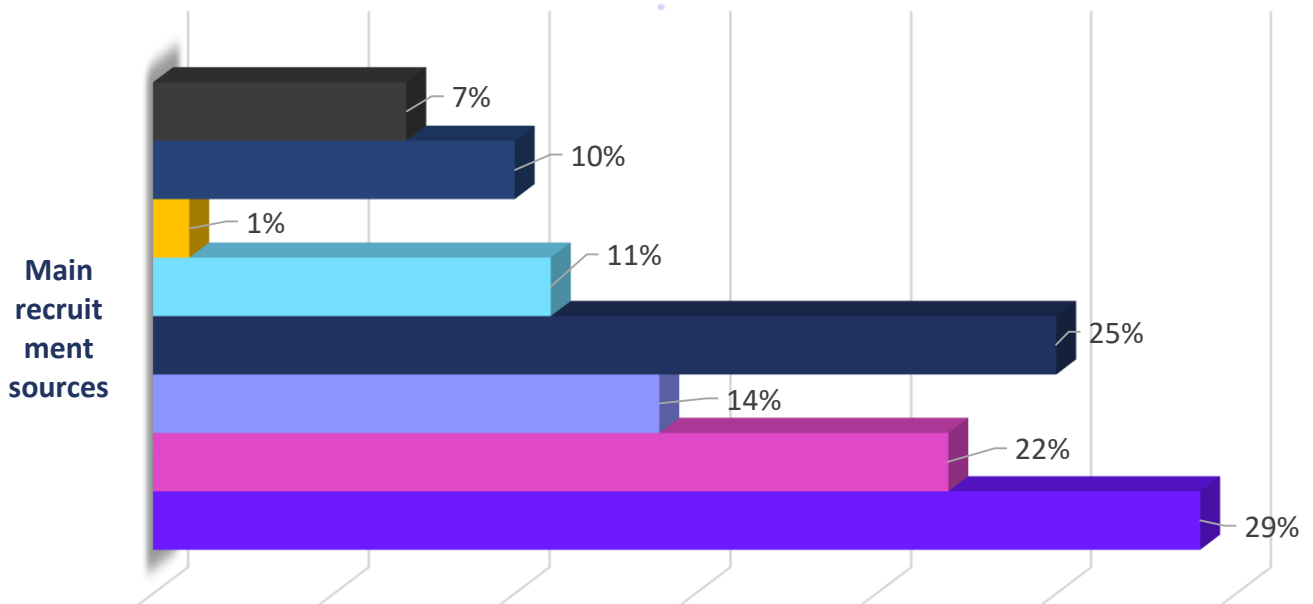
3. CANDIDATES

Those looking for a position in digital or transitioning to a new, more specialised role, are overwhelmingly graduates of university studies, with close to 45% of respondents in this section also boasting post-graduate studies.

The fields of potential applicants are quite diverse: while the fact that marketing is the number one educational background of those seeking a position in digital, there are also psychology, journalism, or even medicine graduates looking at a career in digital.

A diverse range of professionals, which

again highlights the potential of introducing digital advertising as a feasible career track even for those major not immediately connected to the industry.



■ Natural sciences (biology, geography, chemistry, etc.)

■ Technical profile (engineering/ construction)

■ Graphic design/ visual arts

■ PR and Advertising

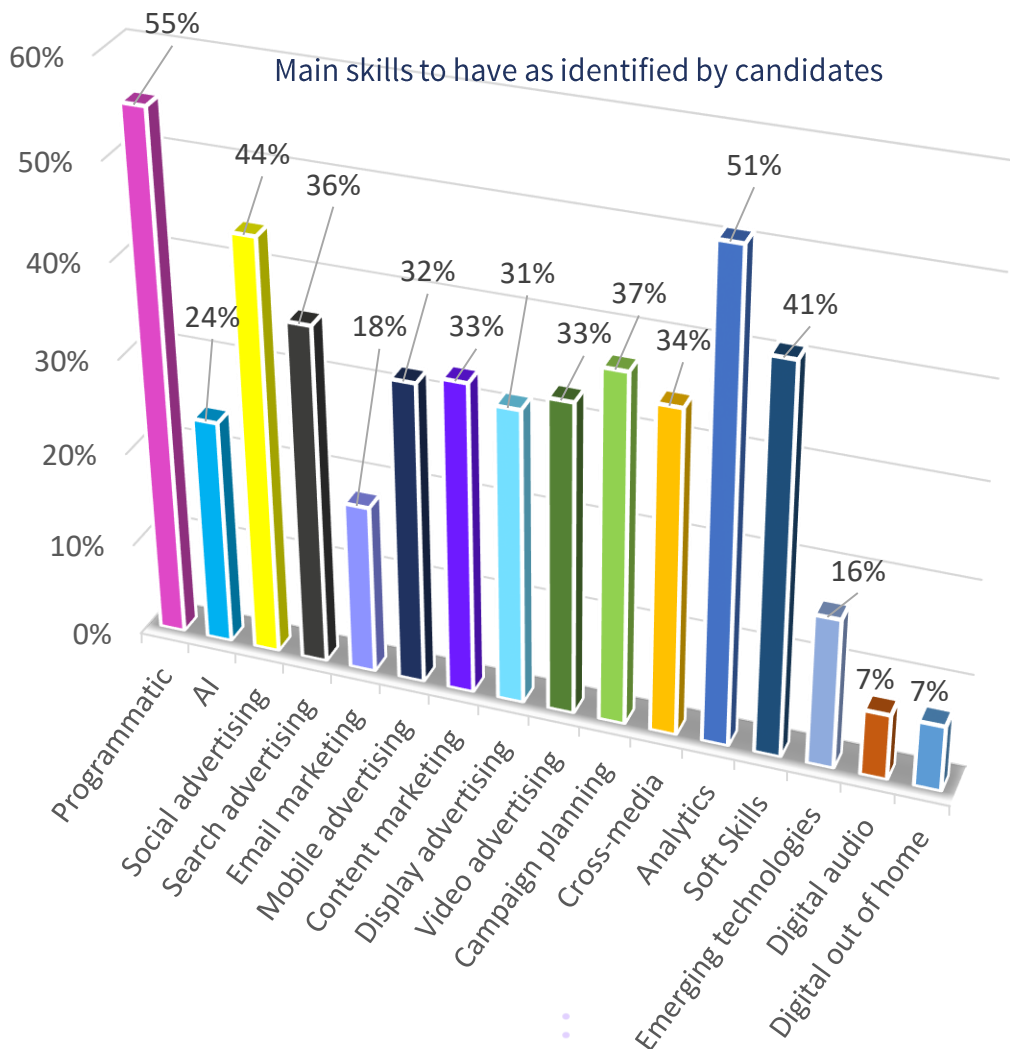
■ Socio-human sciences (Psychology, Sociology, History, etc.)

3.1 SKILLS AND TRAINING

Last year we saw a pregnant dissonance between what candidates believed employers are looking for and what employers were actually interested in.

In 2019, however, **the two sides seem to have harmonised in focus**. Programmatic and analytics rank highest on the list of what candidates believe are interested in (55% and 51%, respectively) – which is perfectly aligned with what employers are looking for. Soft skills also sit on a top position (41%), again reflecting the needs expressed by employers.

So if in terms of focus employers and candidates in digital seem to be on the same page, what is the root cause of the acute shortage of digital talent? Does the theory that one of the main factors to look at as a solution for improvement is our formal education system hold water? An interesting dimension would be to analyse the percentage of training programmes that cater to younger generations versus those aimed at professionals. Perhaps we, as an industry, are not sufficiently focused on the future generation of talent.



Further in our survey respondents were asked to self assess in terms of digital-savviness by giving themselves a score between 1 to 10. The average score in 2019, as in 2018, was 7.

However, as we have seen, the main difference lies in the fact that in 2019 the chief obstacle to recruitment of digital professionals was cited as “an inability of candidates to self-assess”. The inference there was that was a symptom of a misalignment between candidates and employers, reinforced by the difference of opinion when it came to the importance of technical vs. soft skills in the hiring process.

In 2019 it is no longer possible to “blame” the skill gap on the aforementioned dissonance if judging by these responses. We go back to the same conclusion: to have a better-trained pool of professionals in digital, we need to focus efforts on students as well.

Building a strong digital foundation for the next echelon of talent means that it will be that much easier for them to specialise, develop and grow in this exciting industry. Equally important is to reach out to students who might not be immediately aware of the possibility of a career path in digital advertising. Connex majors, such as computer sciences, journalism, economics, programming, are all valid targets.



The Human Capital in the Digital Environment 2019 Report once more reveals that the formal education system is not sufficient in raising qualified candidates for digital industry. To overcome this shortage, we should create more digital-focused; both general and vertical education programs and provide more internship possibilities for university students. The more candidates experience the realities of Digital industry, they can make more feasible choices regarding their career paths. Combining the candidate potential of the universities and the opportunities of the Digital businesses would be a solid start in this aspect.

ILHAN DEMIR, Project Manager, IAB Turkey

The fact that employers and candidates are of one mind when it comes to the skills and abilities that are currently need in the industry is not the only good news.

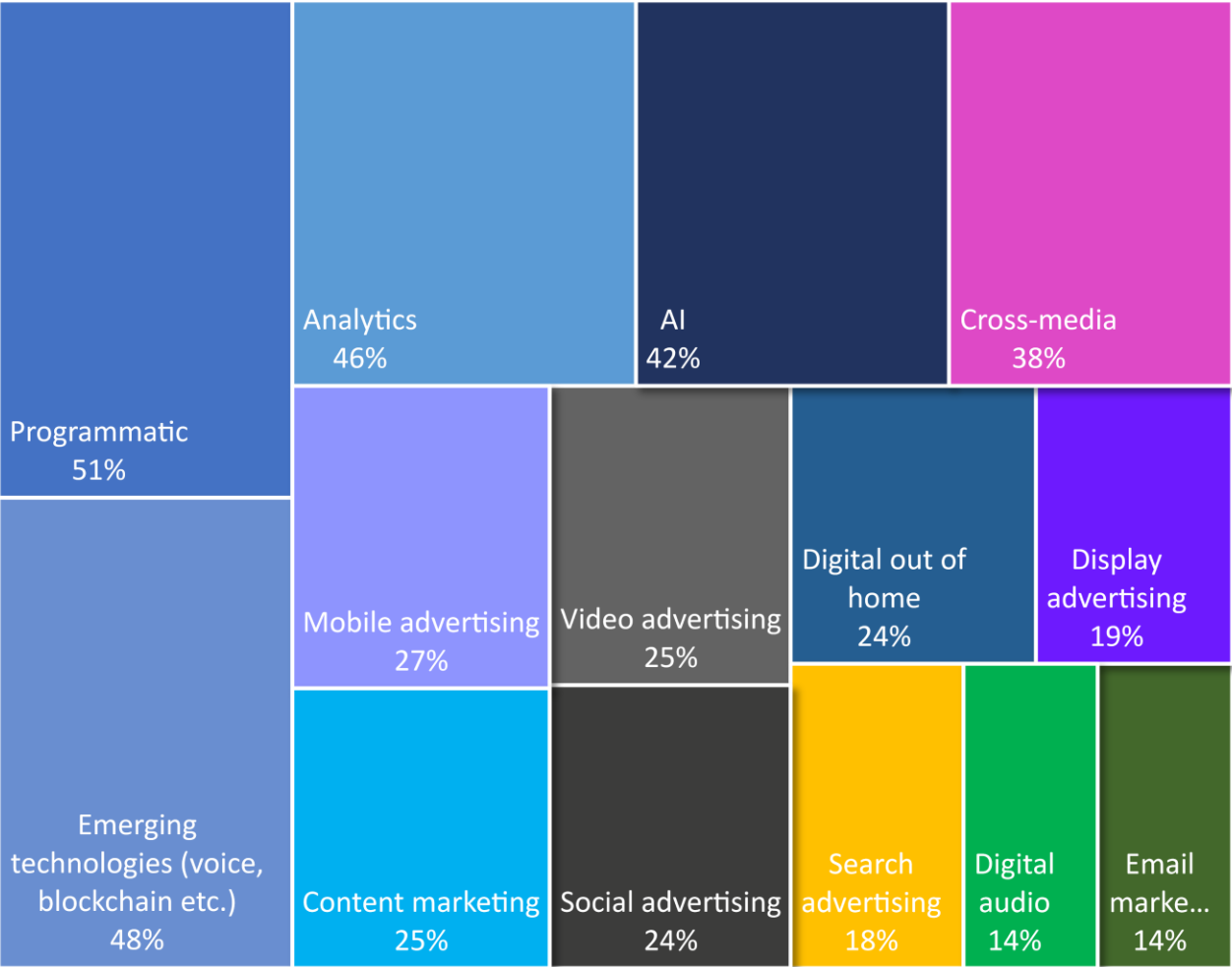
90% of respondents stated that they are willing to attend courses and training sessions to improve the skills and competences needed to transition into digital, even if they have to pay for them. This is a 5% hike from last year when 85% of respondents declared their interested in attending paid courses. It's also worth noting that the respondent pool is nearly double that of last year. **The appetite for training is therefore quite high.**

What are the topics that candidates are

most interested in being trained in? Programmatic, emerging technologies, and analytics hold the top three spots (51%, 48%, and 46%, respectively). Compared to last year, the only difference are the five point gained by analytics.

An interesting dimension brought on by the increasing relevance of digital transformation is that we have started to see responses that call for training in "change management - how to drive change in a company without friction and with maximal motivation", or transformation-driven roles.

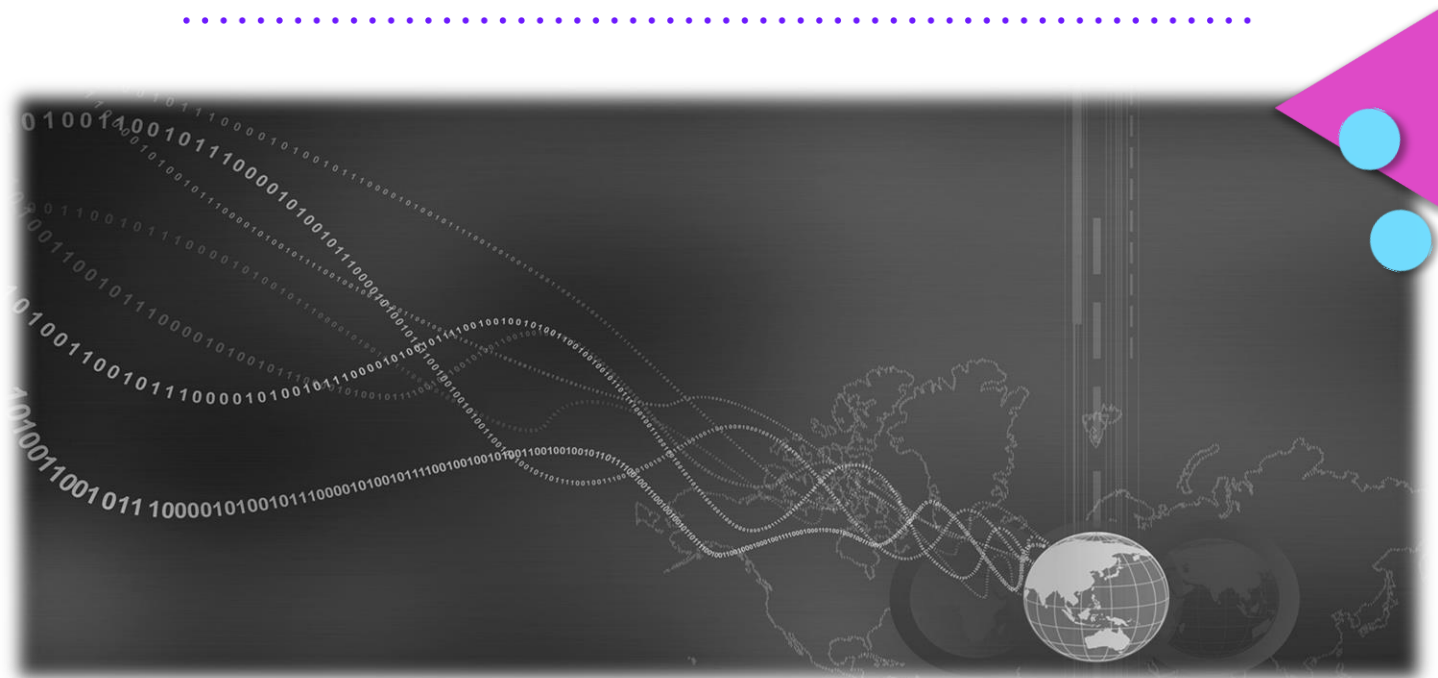
Main training topics candidates are interested in



A slight discrepancy in perspective is noticeable when it comes to emerging technologies, which for employers holds the 5th spot (36% of them identifying as a priority area), whereas in the case of candidates it is regarded as critical as programmatic or analytics with nearly half of respondents wishing to take courses on these topics. Of course, some of this can be attributed to the somewhat ambiguity of the term emerging technologies, but also by a misperception that it is the breakthrough topics that are most sought after by employers.

Whether that is the case, or employers are struggling with filling positions with digitally-skilled employees for existing critical lines of business rather than focusing on the latest technologies is a matter of interpretation, though perhaps the latter is more probable. A similar trend was noticeable in 2018, with candidates potentially over-emphasising emergent technologies in the detriment of what are now mainstream technologies such as

programmatic and analytics.



4. CONCLUSIONS

Education is not as flashy as emerging technologies, it doesn't hold the sway that programmatic does over the industry, it's not at the forefront of the media such as the latest legal disputes, but undoubtedly digital training and education are the foundation on which a flourishing industry can be built, if the responses to our survey are any indication. Responses have shown that in the absence of a formal education system that is not keeping pace with the increasingly digitised world, the digital talent shortage is becoming increasingly acute, driving the skill gap ever wider.

Candidates are more than willing to receive training in topics which are in-demand in the industry. Employers and candidates are aligned when it comes to the skills that are most needed. Yes, some issues do arise with candidates not fully or clearly grasping the demands of the position they are applying for. This, as some employers note could even be a result of HR departments not being clear in their framing of the rigors of the position. Overall, however, it seems that employers and candidates are aligned. Why, then, the skill gap? Why is it so wide, and why is it increasing?

On the one hand, there are only a handful of programmes that candidates seem to be aware of and which they constantly resort to for their training. Most of these cover a wide range of topics, when the industry requires more or less niche skills. The verticals are overlooked in favour of digital advertising fundamentals. Specialising becomes increasingly difficult in the absence of a wide variety of courses and programmes – whether this is due to a true scarcity of training programmes or a lack of visibility for many of them, is something to be discussed, but the fact remains that at least in what concerns the respondents to

the survey, the range of training programmes they are familiar with is quite limited. When factoring in further limitations tied to localisation and market particularities, the offering becomes even more limited.

On the other hand, and perhaps the most pressing issue is what we alluded to in the opening paragraph of this conclusion: formal training. This is something that has been flagged by responders in 2018 and again this year. Specifically, it's the dissonance between the educational requirements of a predominantly (and ever increasingly so) society and the exhaustiveness of formal education which, in many markets, seems to have remained anchored in the past. This issue is compounded by the fact that it is not immediately obvious for students majoring on other topics than marketing and communication, that digital advertising and marketing is a valid career path for them.

Working in the digital ecosystem of today is not limited only to those holding marketing or communication formal degrees. The complexity, diversity and vitality of the online marketing field implies that professionals working in this industry can be drawn from legal/regulation, psychology, statistics, mathematics, economics and other, connected, fields. This is where private industry-led education programmes should close the gap and why education needs to be a priority, both at European and at national level. We, the industry, are responsible for making future generations aware of the opportunities that the digital industry presents and to support them, as they are perhaps the best solution to closing the digital skill gap.

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