



State of the industry



AGENCY REPORT 2021

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CONTENTS



What does the talent pool look like post-pandemic?	3
How can agencies win the war for talent?	5
5 ways to deliver best-in-class hybrid events	8
What does the future look like for events abroad?	10
The highs and lows of budgets, pitches and client retention	12
What are the challenges when pitching post-pandemic?	14

What does the talent pool look like post-pandemic?

A look at how Brexit and the pandemic have impacted the events industry jobs market

By Charlotte Flach



With furlough schemes ending, have event agencies made a sufficient enough recovery to be able to operate without it? C&IT's 2021 State of the Industry: Agency survey asked agencies how the number of staff on furlough had changed since this time last year, and how its legacy has altered the structure of companies.

Of the agencies that took part, 68% are small businesses, 23% are medium-sized companies, and 9% are large businesses. Seventy-four per cent said the amount of staff on furlough had decreased over the past 12 months, 15% said it had stayed the same, and only 11% said it had increased. But what does this actually mean in practice?

Lost talent

Career moves out of the industry will be the biggest ongoing challenges created by furlough and redundancies, says a marketing co-ordinator from a medium-sized London-based agency. "The pandemic has provided people with the opportunity to review priorities and there are people who have re-evaluated their career goals and have made some dramatic changes, to take on something that has more purpose for them," she says. "We have seen employees leaving the business to move into different industries and away from events."

Talented individuals have moved on to careers with the promise of security and stability and are likely to stay there, agrees an operations director from Derby. "A lot of our industry's talent has relocated and moved industry during the pandemic and the complete lockdown of our industry outside virtual events. From hospitality to freelancers and senior positions, they have had to move on and now, with secure futures, they are not willing to move back."

Covid-19 and Brexit are the twin pillars to blame for talent leaving the industry, or even emigrating out of

the UK entirely, says an agency head, based in Hampshire. “Freelancers have moved into permanent roles or left the industry. There is still a level of uncertainty around job security in the industry. All of this means there seems to be less experienced talent available in the market,” she adds.

Candidate market

Unsurprisingly, the roles most in demand at the moment are those requiring digital and virtual skills – for example, producers.

Recruitment drives no longer guarantee that a position will be filled or that it will be filled by the right person, many respondents agreed. There are now more job vacancies than candidates, respondents agree, which is exacerbated by a reduction of young talent joining the industry because of the perceived effect from the pandemic.

Young talent that does join the events industry is at a disadvantage, adds the head of sales at a small agency. “Young people that have come on to the market have never had any exposure to running live, hybrid or virtual events, so they too are faced with the difficulty of finding an employer that has the time and resources to spend in training them.”

The lack of qualified candidates has led to more time needed to shortlist and passively recruit, says one respondent. In addition to this, “candidates have options, so they are not just taking the first opportunity that they see – the majority of candidates are being given two or more offers at a time. The talent war is driving what companies are willing to pay candidates, so smaller companies are being outpriced for talented candidates.”

Industry caution

Salaries are another big concern, especially preparing for an upturn but not yet having the revenue to support it with the right staff. “I see

huge challenges in retaining staff as salaries have increased for staff with digital skills. This will attract staff with live event skills into more UK project-based roles creating shortages as live events return,” says a group events director, whose agency has offices in London and Manchester.

Although many people are browsing for roles, few are actively trying to leave their current job because of worries around job security, says another respondent. “People that are moving are requesting higher salaries than historically they would receive compared with their skillset and experience.”

There is also reluctance from some employers to make any staffing decisions at this time. A managing director at a small London-based agency is being cautious in case the industry collapses again. “We are finding it very difficult to get people to confirm bookings, and so I am offering the current team overtime etc rather than hiring more people,” she says.

“There is still a level of uncertainty around job security. There seems to be less experienced talent in the market”

Rapid expansion

A handful of agencies have fared better, with minimal disruption to staffing or salaries. One such small agency based in Birmingham currently has none of its staff furloughed. “Nobody has resigned since last March due to the huge effort that we have made in paying our staff their pre-Covid salaries, as well as making up in full the voluntary salary sacrifices that we asked staff to make,” says its CEO.

2021 has seen expansion for a Kent-based agency, which saw its team increase by 45% with 30+ new recruits. “The opening of our London office now allows us to attract further industry talent based within the capital, with our HQ still on the South Coast,” adds the MD.

Another medium-sized agency with two UK offices has confirmed it is hiring for 60 roles in two phases through to Christmas, while a small London-based agency sees future developments as “an interesting opportunity with a positive outlook”.

Fundamental change

The general consensus, whether the outlook is positive or negative, is that the marketplace has fundamentally changed since the appearance of Covid-19. Skills that will be needed in 2022 and beyond are in shorter supply and recruitment is becoming increasingly competitive as agencies fight for the best talent.

According to an MD from an agency in Leicester: “Those who have a clearly defined sense of purpose that celebrates diversity and inclusivity in all aspects of agency life will be those who retain the very best talent.”

An executive director at a small agency agrees that a company’s approach to staff will be paramount. He adds: “What will be key is how a company has evolved and developed during the pandemic to be able to offer a stable and exciting career path going forward.”

With recruitment being more competitive than ever, agencies need to reimagine their offerings

By Charlotte Flach

Of those surveyed, 47% expect their number of full-time employees to increase a little by the end of 2021, 38% expect this to increase by a lot, 13% expect this number to stay the same, and 2% expect the number to decrease a little. And although event staff have left for other industries, higher salaries are sought after, and certain skillsets are more in demand than ever, agencies can adapt to entice top talent.

Despite many challenges, the pandemic has provided significant learning for businesses on running their day-to-day operations and managing staff. Many agencies have adapted their approach to accommodate the changing expectations of staff and prospective candidates.

While there is still so much uncertainty, there is currently a smaller talent pool to choose from. Job packages need to remain competitive to attract the right people, with salaries and benefits forming part of this. In addition to this, “businesses need to remain flexible in the current market, as talent will have more say in what they are looking for”, says a business development and marketing director from a London agency.

Digital revolution

One of the most notable changes post-pandemic is the acceleration of the digital revolution that has been necessary to keep teams connected to each other and to clients. Due

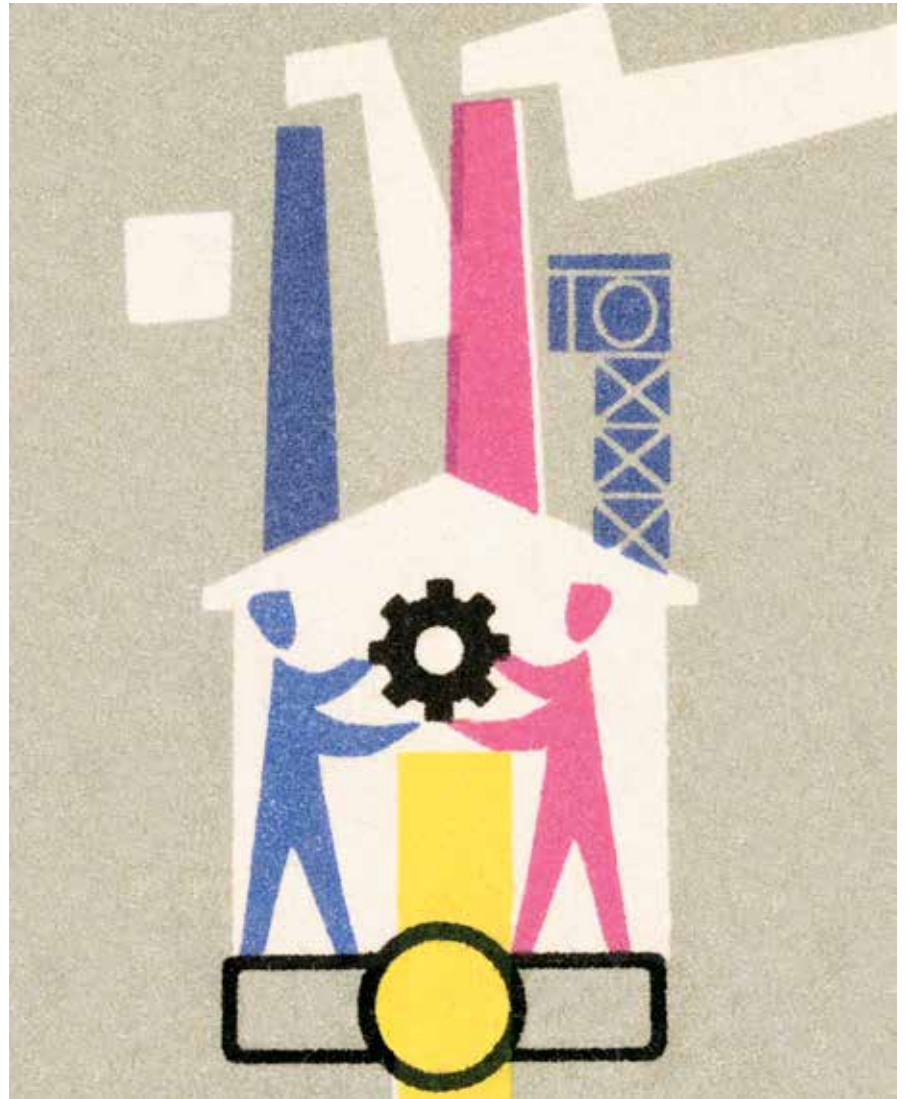


Illustration: Getty images / CSA images

How can agencies win the war for talent?

to this, the industry is having to reimagine talent acquisition in a landscape where multiskilled employees that are adaptable and have been quick to pivot are highly sought after, says a marketing director from a Berkshire agency.

Although many event planners have upskilled and now have an array of virtual event skills under their belts, they are being headhunted by a greater number of agencies. However, the remote working revolution could benefit agencies that aren't located in a city. "Geography is much less critical. Staff are still seeking interesting clients and projects, along with a competitive benefits package," explains a director of events from Northampton.

Remote working

"As the global pandemic has taught us, and our significant learning from the digital transformation that many businesses went through, we no longer need the team to be based from an office," agrees the managing director of a small agency with London and Manchester offices. "We are now more open to remote and flexible working, which widens the talent pool to our benefit."

A major shift in employee demands has been set in motion, with fewer people prepared to spend long hours commuting and also expecting work to be more flexible.

Employees are now used to a better work-life balance, meaning that deciding how much of this flexibility can stay in place will have to be balanced against client needs, several respondents agreed.

"Whilst we are doing our best to support this, it is difficult to manage in our industry as we always need to be accessible and answerable to our clients, therefore flexible working doesn't always work," says the managing director of a small agency.

One Kent-based agency argues that its flexibility in terms of home-

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working and ring-fenced time off has led to 2021 being its best year for attracting, securing and retaining top industry talent. "It can be argued that remote working was what salvaged 2020," says its managing director.

"In 2021 it is vital that employers keep communications open with their teams, to ensure a model that works for everyone. I think we have proven that remote working is no barrier to productivity or performance. The very best employers should be open to working flexibly and collaboratively to ensure the talent recruited or retained in 2020 can develop and advance in 2021," he adds.

Engaging culture

A potential solution to the employee need vs client need debate is digitising the team environment, with employees working from both home and office locations moving forward. "We need to ensure that teams still feel connected; that employees and managers are given the tools to try and replicate an in-person environment as best as possible," says one respondent.

Additionally, there needs to be a renewed focus on engaging employees through a positive working culture and offering training and development opportunities. "This is about really appreciating your team, how the landscape has changed in regards to priorities, ability to work from location and also training and progression as well as an engaging and community-driven culture," says the CEO of a small London agency. "A challenge that is frankly only going to breed more fulfilling, more productive teams."

Wellbeing

Health and safety are growing in importance, due to a renewed emphasis on hygiene and health, with employees expecting employers to demonstrate that their health is



Illustration: Getty Images / CSA Printstock

“Our focus now needs to be on rebuilding our industry and nurturing new talent”

paramount when making decisions, says another respondent.

Wellbeing is also a huge part of this, and merely paying lip service to mental health is no longer good enough. Physical, financial, emotional and mental wellbeing have all been impacted, so it's important this remains at the top of companies' agendas, with proactive support and toolkits provided, many agreed.

“The pandemic has made me more aware of my and my colleagues' mental health and the challenges that working remotely brings,” says the head of marketing from an agency in Hertfordshire. “I think striking the right balance between virtual

and in-person socials is key too. I truly believe that if we find the right balance between work and life, then recruiting and retaining new talent will be a much easier process.”

General sentiments were summed up best by a PR and campaign manager from a London agency. “The challenge is retaining existing talent as we explore the most appropriate, flexible working solution, one that follows health and safety guidelines, allows for individual circumstances and creates opportunities to collaborate. It's crucial we engage the team remotely during a turbulent time – all the while retaining agency culture and who we are.”

Rebuilding and nurturing

The potential of newcomers should not be squandered, says the MD of the London and Manchester-based business. “Our focus now needs to be on rebuilding our industry and nurturing new talent to work their way up and be the best they can be.”

As Europe catches up with its vaccine roll-out, appetite for larger in-person events will be the catalyst to expand business operations. Coupled with the lifting of travel restrictions, this will expand event activity, predicts one respondent. “Talent is very aware of this synergy between both these aspects in the expected growth of business into 2022.”

5

ways to deliver best-in-class hybrid events

A collection of top tips from those that have learnt from the era of virtual events

By Charlotte Flach

The events industry is incredibly resilient, reactive and innovative. With the pandemic came the sudden pivot to virtual and, later down the line, hybrid events. Many have embraced these formats, upskilling to build the new set of competencies required from event planners.

“They will be a mainstay of UK events for evermore,” says an agency CEO from Birmingham. “While we are all looking forward to live events coming back with a bang, corporate clients will use digital and hybrid events tactically to keep their employees safe, save money and engage bigger audiences.”

An agency director in Surrey disagrees. “I think that neither digital nor hybrid will ever replace face-to-face events. For us, the moment restrictions were lifted, the demand for virtual events instantly disappeared,” she says.

Whether you like them or not, it’s clear that virtual and hybrid events offer many benefits, especially as technology will continue to allow them to evolve to become a more accessible and advanced channel of communication and engagement.

“Face-to-face and physical interaction is hard to replicate, and we are eager to be in person again, but digital experiences bring so many benefits, including reach, measurability and sustainability. The multi-channel approach really opens up so much opportunity,” says one respondent.

A managing director from a Bristol agency agrees, saying that “organisations that insist on ‘going back’ to live events run the risk of being seen as outdated”.

Although there is disagreement about just how important virtual

events will be in the future, everyone agrees their legacy is here to stay. And here are respondents’ top five tips on delivering virtual and hybrid events...

1 Engage everyone equally

Whether the format is live, virtual or hybrid, the audience should be at the centre of the experience. Virtual audiences should never be passive viewers, and if there is a hybrid or live element, attendees should never be thought of as two separate camps.

A digital or hybrid audience has the same value as an in-person attendee and should have access to all the same response mechanisms if possible. Mapping the attendee journey is an essential part of the planning process, alongside logistics and technical support, helping create an event that is both friction-free and has personalised and relevant content for attendees.

“The expectations and demands of virtual audiences have significantly increased over the past 18 months and we need to ensure they are engaged and feel part of the event and experience those goosebump moments just as much as the live audience,” says an account director

“Face-to-face is hard to replicate, but digital experiences bring many benefits”

from an agency that has offices in London, Manchester and the Midlands.

2 Reconsider content

Ask yourself how you would engage with the event and its content. Attention spans are even shorter for virtual events than live sessions, with the audience losing interest between 90 and 120 minutes for digital events.

Content needs to be even more concise and engaging, with consideration for how the event message fits into the timeframe and tools to help the audience interact with the sessions and speakers. “Champion creating a compelling experience for all audiences, and providing attendees with control over their experience, including where, when and what kind of content with which to engage,” advises a marketing co-ordinator from a London agency.

“Organising smaller groups of people and creating ‘watch parties’ is a great way to create a virtual audience, but with a shared experience,” says one managing director. “As restrictions lift, use the rules to your audiences’ advantage, creating smaller physical and virtual groups to experience the event.”

3 Make the investment

Budgets and resources should be appropriate for the event. For example, a hybrid event essentially needs a budget for two events – live and virtual. Many audiences now want to access content on demand at a time that is convenient to them, which will also require extra resources to produce and host.

Partnering with the right, not the cheapest, suppliers is paramount, which is more true than ever for virtual and hybrid. Technology is never a wasted investment.

Time is also a precious resource, and any event which incorporates digital elements will need a greater time investment. More pre-planning

and rehearsal is needed, including coaching speakers and being patient with anyone who isn’t used to presenting to a virtual audience.

“The time and effort put into this will reap the rewards you are seeking, making the investment both in time and money all worthwhile. More so with the old adage, fail to prepare, prepare to fail could not be more akin with a digital or hybrid event,” says a director of marketing at a London agency.

People are busier than ever and will want to come away feeling their time at an event was well spent. “Driving value and return on their time investment for the audience is critical to achieving engagement,” sums up a head of agency from Hertfordshire.

4 Embrace technology

Virtual massively increases the reach of an event, removes barriers such as cost of travel and venue, and circumnavigates any travel restrictions. There is also a unique opportunity to increase the reach of potential collaborators and invite guest speakers that wouldn’t be able to attend in person.

Tech can also have its downsides, and the pivot to virtual has also

highlighted the importance of getting it right. “If the connection is broken or the sound quality is poor, you simply log off and are likely not to return but go about the rest of your day,” says one respondent. “The lasting result is one of dissatisfaction and poor delivery for the virtual viewer, who is far more critical than an in-person attendee. The damage is longer lasting and is likely to result in the viewer not wishing to join a future activity.”

But the analytics built into virtual platforms and software means that event organisers now have access to a vast amount of data that wasn’t necessarily available at live events. This renewed focus on data has emphasised its use in demonstrating ROI, generating strong leads and making decisions on future products, business strategy and events.

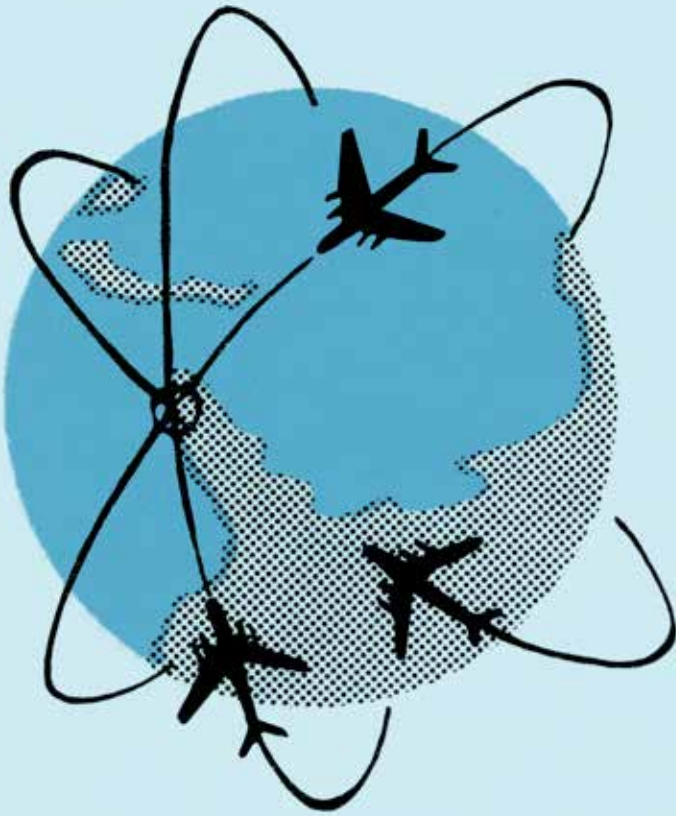
5 Research your options

With multiple options for how an event is delivered, agencies should take the opportunity to ask how the event fits in with client goals. What is the best format for this particular event? Am I running it live for the sake of it? Or am I hosting it virtually despite feeling it would work better as hybrid? Is the client prioritising sustainability?

Upskilling and informing both yourself and your colleagues means you can provide a better experience for clients and their delegates. Do your own research, attend lots of events and run events on a variety of platforms.

“Attend as many demos as possible and pick your favourite selection and master them. Make sure you have your digital event templates mastered so that you save time on each,” says an event director from Surrey. “Naturally, as you would for a live event, ensure you have everything covered in production and budget before your client signs off to avoid any disappointment in delivery.”

“Agencies should take the opportunity to ask how the event fits in with client goals”



What does the future look like for events abroad?

Coronavirus, Brexit and sustainability are all impacting the decisions made on international travel and hosting events overseas

By Charlotte Flach

With changes to government guidelines, quarantine rules and border controls happening constantly, planning to host an event abroad is currently tricky business.

But despite the various hoops to jump through, the outlook is positive, with only 10% of respondents saying they have no events planned abroad for the next 12 months. That leaves a massive 90% of agencies still expecting to host events abroad over

the next year. But which destinations are on the radar?

Short haul

Europe was a popular answer when respondents were asked which destinations they'd be hosting in, with Spain, France, Germany, Iceland, Portugal, Holland, Switzerland and the Nordic countries receiving numerous mentions.

One agency that hosted a live event in Spain in August predicts clients

will feel most comfortable with destinations that are closer to home, namely in the UK or Europe. "That said, it does depend on what happens with the government guidelines," says the respondent.

"If they remain the same, we'd also expect those destinations that have been consistently on the green list, with a strong vaccine roll-out and no quarantine on arrival in the destination, to potentially be contenders too."

It's also a good time for less popular European destinations. "There will be more focus on Europe and short haul, so destinations like Slovenia will increase in appeal as relatively unknown but considered close and safe," says the group events director for a medium-sized agency.

"We have confirmed events taking place in France, Spain, Germany, the Netherlands and the US, with potentially more locations to be confirmed," adds the managing director at a Kent-based agency.

However, it's not all short haul. Parts of Asia, America and the Middle East are also on the agenda for the next 12 months, including Singapore, Thailand, China, the UAE, Canada and the US.

But in the short term, it seems destinations closer to home, or even domestic, are the preference. "At present, it is domestic [in terms of predicted destinations] with some talk of Europe, but they are only early days discussions," says a director of events at a Manchester-based agency. "Short term, I think there will be a domestic focus."

New considerations

A host of factors will continue to influence destination choice, with the list of things to consider even longer than before. Vaccination rates and reciprocity of travel restrictions, as well as flexible and mutually beneficial contractual terms, will be top of the agenda, says an associate director from a Surrey agency.

With each country having its own set of rules and regulations, global events will be much more complex to navigate. "Not only will health and safety be at the heart of everything we do, but we will now have to consider even more policies, procedures, risk assessments and regulations than ever before, as well as vaccine programmes, vaccine passports,

traffic-light systems and government guidelines," says a managing director.

Unsurprisingly, clients and their delegates will expect a destination, venue or hotel's processes around preventing virus transmission to be thorough. "The shift, in general, is much more focused on sanitisation, good social distancing processes and providing peace of mind," says a head of marketing from St Albans. This will prevent liability issues, disruption to the business and/or additional costs.

One respondent, a CEO of a London agency, said she would be looking at destinations close to airports or walk-in test centres to avoid having to bring in testing arrangements just for an event.

Brexit will also need to be factored in, along with risk assessments of venues and facilities, and ease of getting to – in addition to quickly getting out of – the destination, adds one director of events.

"It's not about the pandemic. Our clients are over the hill with the coronavirus. It's about the impact on the environment"

Furthermore, the need for virtual and hybrid event participation has made a venue or destination's ability to provide the technology, WiFi speeds and space capacity even more important. "It is also likely that destinations will be selected closer to home as there is an increased level of tolerance for delivering events in a hybrid fashion. People have realised you don't need to travel far to get the same experience," says one agency leader.

Sustainability

However, not everyone agrees that the pandemic is the most important consideration any more. "It's not about the pandemic," argues the founder of a London agency. "It's about sustainability. Our clients are over the hill with the coronavirus. It's all about the impact on the environment."

Carbon emission reduction will be ever more important to clients, with outdoor programmes and exclusive use also featuring more heavily on agendas. "They aren't new factors but companies are more and more conscious of their carbon footprint," agrees a business development and marketing director, although she admits that Covid-19 figures will still play a part.

Activities that involve giving back to local communities, agendas that incorporate wellbeing, and sustainable venues will become increasingly more popular with clients.

"Destinations offering those kinds of activities, combined with the option of a stay in an eco-resort, for example, are likely to be of more interest," says one respondent. "As we emerge from the pandemic, we also feel more customers will look to hold more events in more relaxing, remote locations, as opposed to a fast-paced city destination."

The highs and lows of budgets, pitches and client retention

Agencies will need to be winning new business and retaining existing clients, but have they managed to do so?

By Charlotte Flach

Agencies are dictated by the budgets clients set for them, and therefore what they are able to deliver with the resources available. So after a long and challenging year, what is the current condition of client budgets and how will they change going forward?

Of the agencies surveyed for this year's State of the Industry: Agency report, 42% said they had stayed the same over the past 12 months, 25% said they had decreased a little, while

21% said they had decreased by a lot. Ten per cent said there had been a small increase, with only 2% reporting a large increase.

However, when asked how they expected client budgets to change over the coming year, the outlook was brighter. Sixty-two per cent expect them to increase a little, 26% think they will stay the same, 9% think they will decrease a little and 4% say they will increase a lot. No-one said they expect them to decrease a lot.

Meanwhile, retention of existing clients in 2021 has mostly been strong. Forty-nine per cent of respondents have retained 100% of their clients, while 43% of agencies have retained more than 75% of their clients. Four per cent said they had retained more than 50% but less than 75% of their clients, while 4% had admitted to retaining less than 50% of their clients.

And while retention is one thing, new business is also vital. And so,

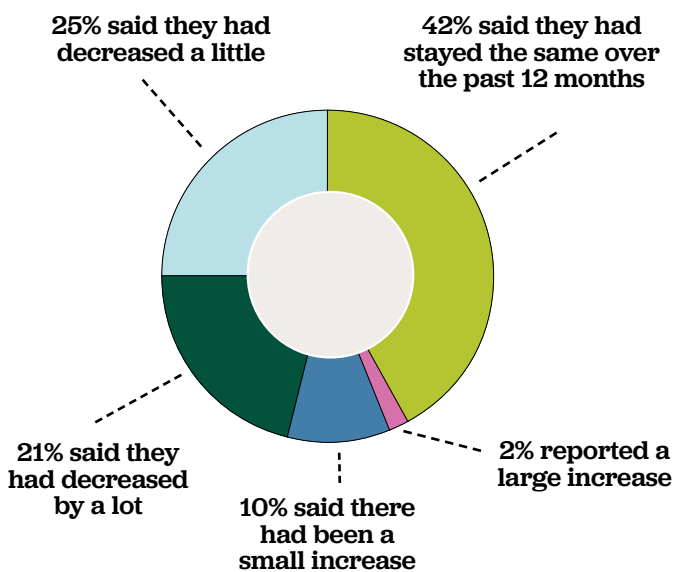
when asked how the frequency of client pitches has changed in the past year, 38% said it had increased a lot and 26% said it had increased a little. Thirteen per cent said it had stayed

the same, while 15% and 9% said it had decreased a little and decreased a lot respectively.

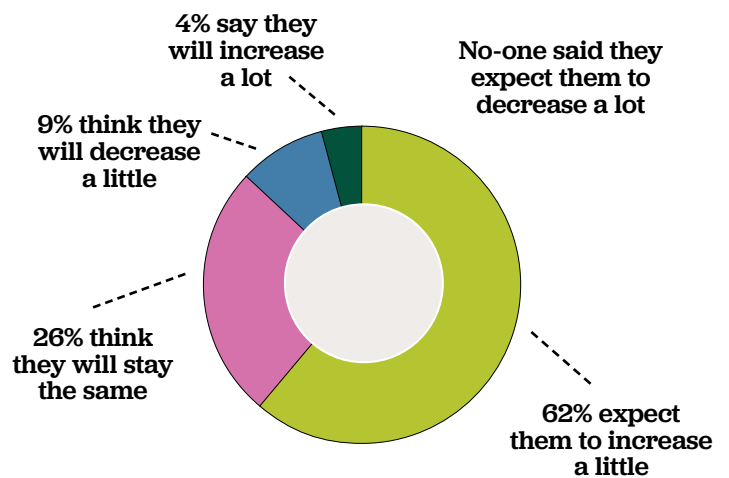
In terms of client base, 44% said that less than 25% of their client base

was new business in 2021. Thirty-three per cent said that between 25% and 49% was new business, and 23% said that more than 50% of their client base was new business.

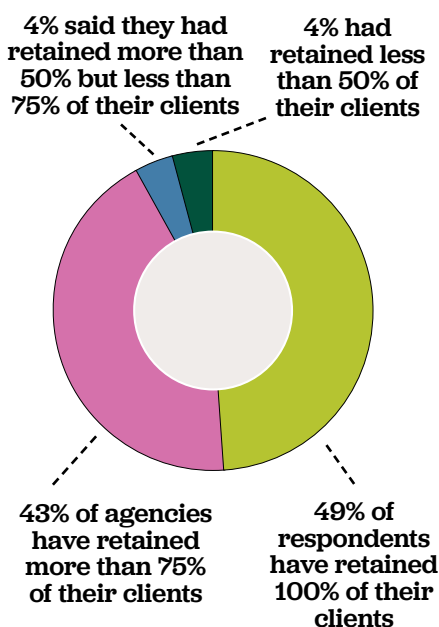
How client budgets have changed over the past year:



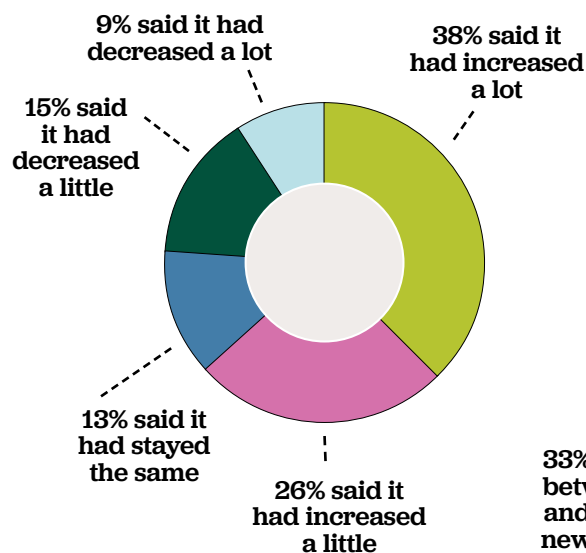
How client budgets are expected to change over the coming year:



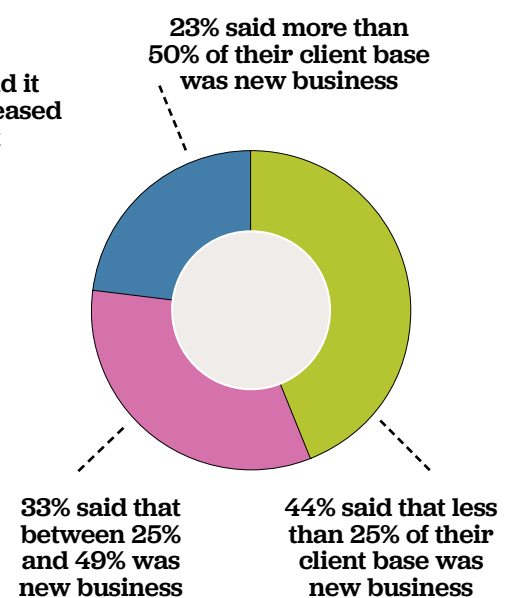
Retention of existing clients in 2021:



How much the frequency of pitches has changed in the past year:



Client base in 2021:



What are the challenges when pitching post-pandemic?

Multi-format solutions, virtual client meetings and shorter lead times are just a few of the hurdles agencies are having to overcome

By Charlotte Flach

Illustration: Getty Images / CSA-Printstock

With many agencies reporting decreased budgets and the rise in the number of virtual and hybrid events, what are the other challenges for agencies pitching post-pandemic?

With the necessity to take events into the digital space during the pandemic, and as some coronavirus restrictions continue, virtual and hybrid alternatives are becoming part of the contingency plans for a number of clients. However, even post-pandemic, many are of the belief

that “hybrid is here to stay” and so this means that many agencies are now having to factor in multiple-format solutions when they pitch, regardless of the virus.

Time and knowledge

“The requirement to now propose multi-solutions, hybrid, pure virtual and live, is a challenge,” says an operations director from a Derby agency. “There are requests for responses with the same turnaround time but more work.”

“Businesses are also challenged from a budgetary perspective, while prices of raw materials and labour are all increasing,” explains an account director from the Midlands. “All of this combined leads to resource, time and creativity issues within the team, who are often delivering client projects while trying to pull together proposals and pitches for new and existing clients.”

In addition to being more labour intensive, these pitches require knowledge of live, virtual and hybrid

and the ability to talk competently about how different formats work. But the demand for greater knowledge doesn't stop there; other areas that require extensive knowledge include understanding cancellation clauses and costs and the legalities of last-minute changes, says the director of a small London agency.

Creativity

On the positive side, however, the same director also finds that "creativity is back to the forefront. Each pitch nowadays is incredibly bespoke to the client's brief."

However, not everyone is convinced that creativity in pitches is being sought after or prioritised. Within some companies, procurement teams have taken over the process of vetting suppliers, leading to a focus on cost and budget, says the head of sales from a London agency. "This has meant there is no real interest in the creative part of a proposal. This makes it hard to work with and harder for agencies to help businesses meet the real ROI goals."

A managing director from a Leicestershire agency agrees that the role of procurement is becoming disruptive. "Comprehensive briefs, requiring significant time and financial investment, are being issued with no indication of budget, which makes it impossible to gauge the ROI for the agency," he says. "We are also seeing clients issue speculative briefs for ideas that they have had, but that don't have the financial backing from their business."

"Competition is only going to increase and agencies will slash costs to win business, which is bad news for the industry as a whole."

Pitching in person

As the globe emerges from the pandemic, some agencies are concerned about the feasibility of being able to pitch clients face-to-face again, in order to capitalise on

the in-person element of building new business relationships. With potential restrictions on how many people will be allowed into a room to pitch, a challenge could be deciding which members of the team are most essential to win business.

This is especially tricky at a time where there will be more details to think of. "While we would have always covered every detail before pitching for an event, there are going to be more details to think of, and more questions from customers around the health and safety of attendees. That will also create more pre-pitch work for the team too, in what can already be a tight turnaround," says one respondent.

"Resilience, innovation and strong partnerships are key to success"

Virtual pitches can have upsides, a Worcestershire agency argues. "One interesting view is that virtual pitches can often be more engaging and successful, depending on how they are delivered, as it puts the agency in control of the output. There are now so many more factors and variables that need to be factored in. It's a competitive market at the moment and one of the key things is being able to stand out in the crowd, and show flexibility and agility when it comes to designing experiences."

One positive that has come from staff turnover in the industry is that a few agencies have gained new

business. "Some of the PAs were made redundant but got in touch when they found a new job, meaning we got new clients from them," says a director from Surrey. What's more, some sectors have been booming during the past 18 months; "a big chunk of our clients are in the finance services and both private equities and advisory firms have been busier than ever during the pandemic".

Resilience

Despite these new challenges, 47% said they were very confident about the future of the events industry and another 46% said they felt confident.

One controversial opinion from a Leicestershire agency is that the pandemic has rooted out agencies that weren't up to scratch. "We think Covid has exposed those who were trading off the backs of one or two large clients, who we all looked up to but who have struggled without a more diverse client portfolio."

"We think that being small and responsive is going to be a strength and those agencies who spend the time getting to understand their clients' challenges in 2022 and beyond will be those who continue to offer a significant point of difference from their competitors."

One respondent says that the industry will be able to meet these, and other, challenges with its "can-do approach. It's been an opportunity to pause, reinvent, reflect and repurpose some of our solutions. We need to embrace the appetite that's out there for in-person experiences, while providing the opportunity to engage virtually to allow flexibility and engagement in a modern world."

The key to the future will be strong partnerships across the board, not just with clients, says a Surrey agency. "We need to lead the future of the industry with confidence. Resilience, innovation and strong partnerships are key to the success in shaping a bright future."

TOP UK AGENCIES BY EVENTS-BASED TURNOVER

TOP 10

1	IDENTITY
2	GPJ
3	BRANDFUEL
4	CWT*
5	ASHFIELD EVENT EXPERIENCES
6	JACK MORTON WORLDWIDE*
7	2HEADS GLOBAL DESIGN
8	SMYLE
9	WRG
10	BCD

TOP 20

11	TOUCH ASSOCIATES
12	AGIITO
13	TBA GROUP
14	THE FRESH GROUP
15	STRATA
16	VENUES & EVENTS INTERNATIONAL
17	TOP BANANA
18	BI WORLDWIDE*
19	GRAY DAWES EVENTS*
20	PRODUCTION BUREAU

TOP 30

21	YES
22	FIRST EVENT*
23	CHEERFUL TWENTYFIRST
24	MARBLE LDN
25	PURE COMMUNICATIONS
26	CLARITY
27	FIRST
28	TAYLOR BENNETT PARTNERS
29	DRPG
30	ASPECT

TOP 40

31	LIVE UNION
32	EMC3*
33	XSEM
34=	SLEEK EVENTS
34=	WOLF & WHITE
36=	C2 EVENTS
36=	IN2EVENTS
38	THE APPOINTMENT GROUP
39	THE OUTLOOK CREATIVE GROUP
40	WORLDSPAN

*Events-based turnover is an estimated figure based on 2019's actual figures and the average difference in turnover this year



TOP UK CHALLENGER AGENCIES

TOP 10

1	BLACK BOOK
2	SOMBRIGHTSPARK
3	PRINCIPAL GLOBAL EVENTS
4=	AMT EVENTS
4=	MGN EVENTS
6	OPUS
7	LEMON LANE
8	ANOTHER WAY
9	ZIABIA EVENTS CONSULTANCY
10	GOHO



State of the industry

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