



**The Marketing, Digital and Creative Industry
Pulsecheck Survey, 2020**

The Marketing Digital and Creative Sector Pulse Check Report

Thanks to all who completed the survey. We had a significant response and hope you find the following report useful and informative. It certainly provides a benchmark for sentiment and business health. The overall picture is more positive than negative.

The survey was conducted on two platforms, firstly direct to our clients, primarily but not exclusively in the Northern regions, and secondly on LinkedIn where anyone with the link could complete the survey. There are some interesting differences between the results so where appropriate we have provided both summaries.

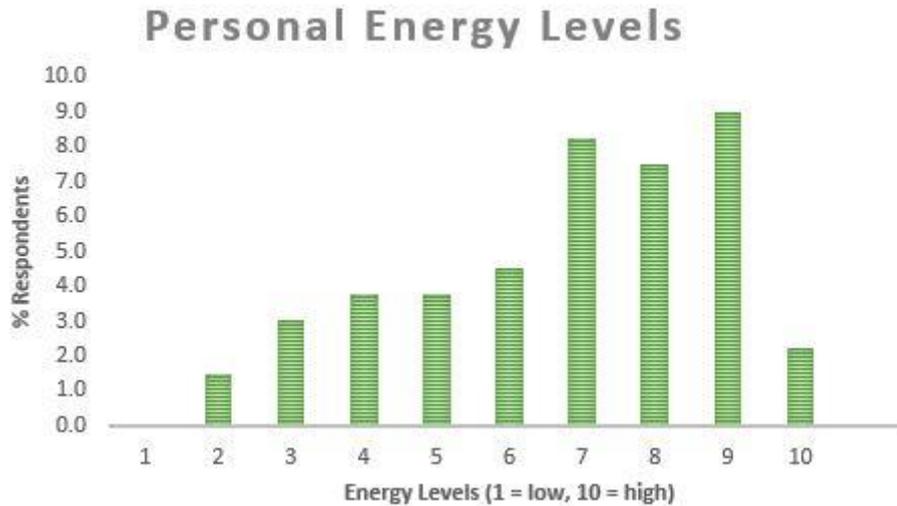
Level of Business Optimism

We asked how confident our clients were feeling as we hit months 4- 5 of lockdown. Restrictions on movement were lifting and from what we heard across many markets, companies were starting to rebalance to a new normal. The results from our clients suggest that over 70% of responders felt confident or very confident with a mean score of 6.7/10. Interesting that the respondents from LinkedIn scored their confidence 7.8.



Personal Energy Levels From Our Business Leaders

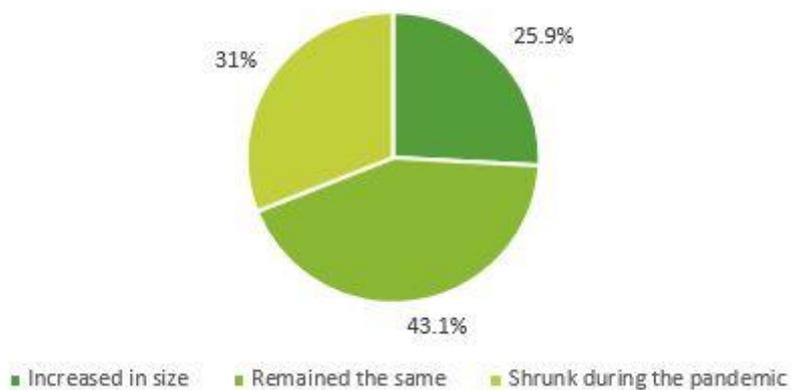
Despite having a prolonged period of uncertainty in business, respondents responded generally positively when asked how their personal energy levels were at this point in the pandemic with scores from our clients and LinkedIn respondents at 6.68/10 and 7.2/10.



How Has The Pandemic Affected The Size Of Your Team?

Interestingly 24% of companies claimed to have increased the size of their businesses during the pandemic however this is balanced out by 32% of companies decreasing in size across the same time period.

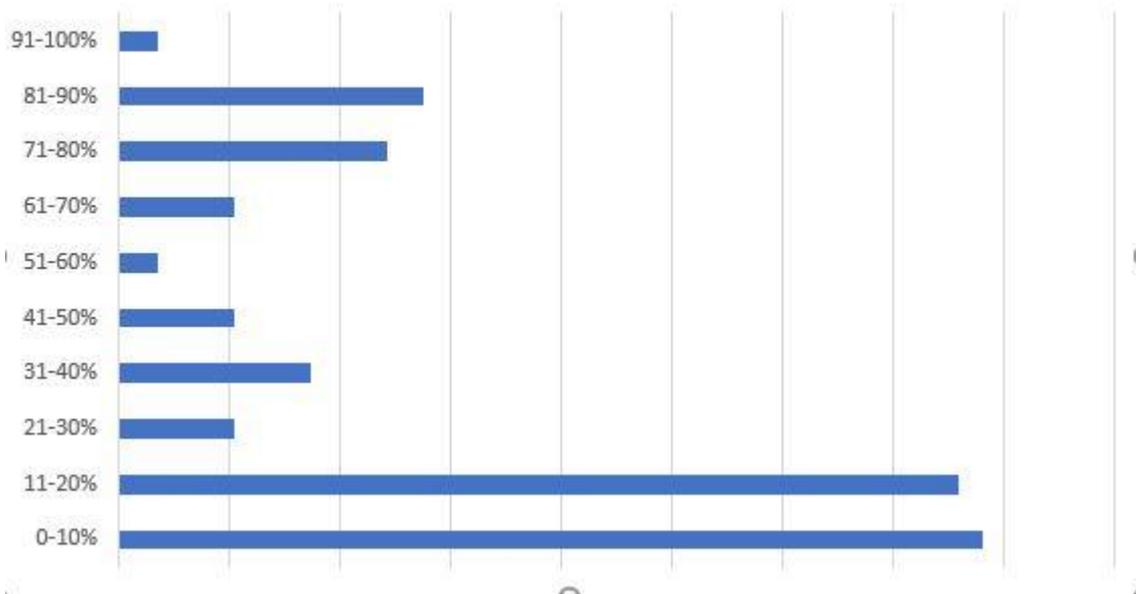
How did the Pandemic Affect the Size of Your Team?



Furloughed or Still Working?

Furlough, a phenomenon not often heard of or used commercially, certainly in our lifetimes has now become an everyday terms and arguably a government policy that may have saved many businesses and jobs. Perhaps surprisingly, the average number of staff being furloughed across the respondents was 26.34% with only 10% of companies furloughing 80% or more staff.

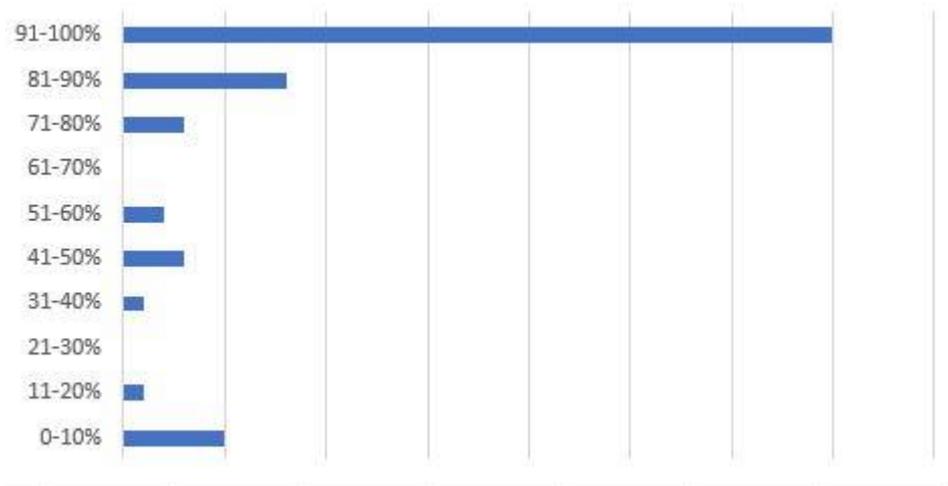
Percentage of Staff Furloughed



Working From Home

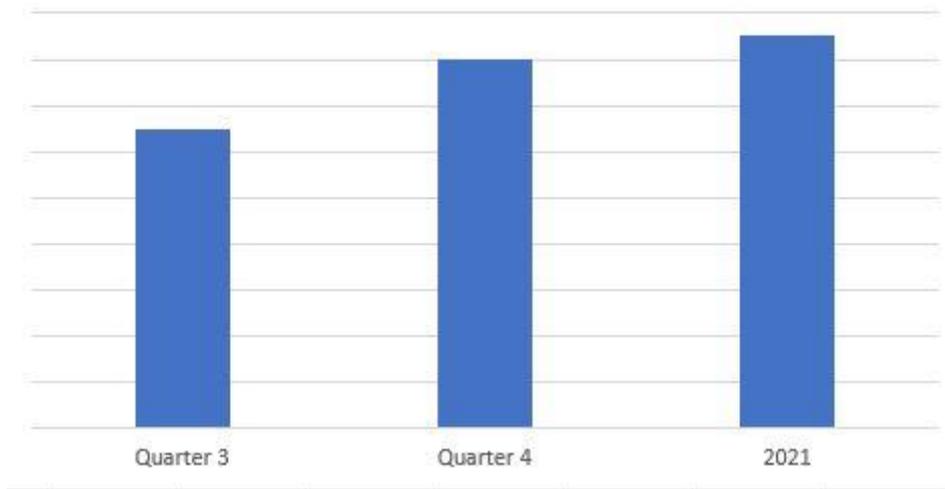
Working from home seems the new norm with many of our clients planning on offering flexible working from home upwards of 1 day a week. Clients in this survey had over 80% of staff working from home which was to be expected but there’s no doubt this has created a shift in employers perceptions of the merits of working from home.

Percentage of Staff WFH



We asked respondents when they expected to return most staff back to the office and create the new normal working pattern and the majority responded that it would be 2021 before they were back in the office on a permanent basis. However, 18% of clients told us they are never expecting to have all their staff back in the office.

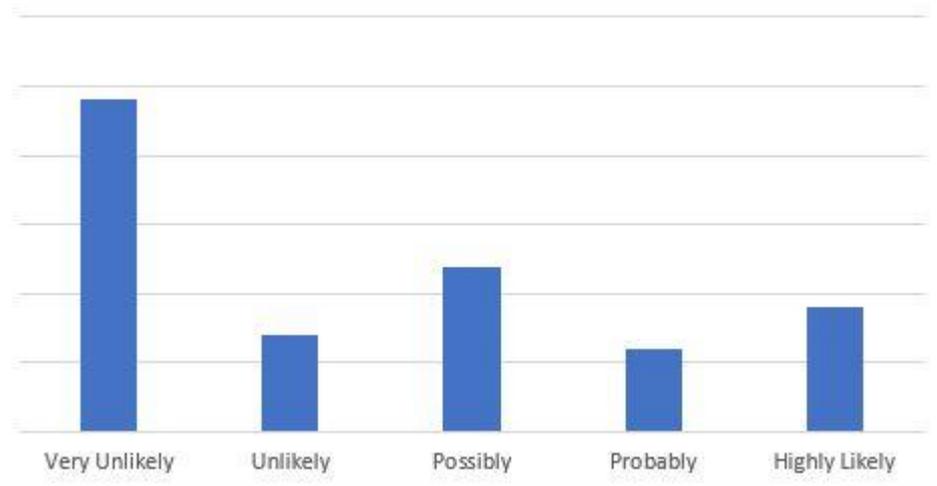
When Are You Expecting to Return To The Office?



Potential For Redundancies

Just over 50% of clients said there was a very low likelihood they would make redundancies post furlough however, worryingly that tells us that up to 46% of clients are considering letting staff go.

Likelihood of Making redundancies



What Are Your Three Biggest Challenges?

The three biggest challenges for our clients broadly fell in to three categories:

1. Uncertainty – unsurprisingly this was the most used phrase across all of the respondents.
Uncertainty of:
 - a. Client spend
 - b. Consumer confidence
 - c. Marketing budgets
2. Staffing and Company Culture
 - a. Getting staff back in to the office
 - b. Maintaining a culture and cross team communication
 - c. Team morale – will existing and new staff still feel part of something
3. Marketing survival

- a. Agency respondents cited reduced budgets and extra strain on client resources
- b. Client side respondents commented that resources previously earmarked for marketing initiatives may be redirected to protect jobs post-furlough

What Are The Greatest Opportunities

And finally, on a much more positive note, the greatest opportunities for our clients are summarised as:

- a. Home working/flexible working giving us all a better quality of life
- b. Business structures/sizes and processes being leaner meaning more efficiencies/better working practices
- c. Geographical boundaries being blurred as more people work from home, the need to be in a specific location, like London for example, becomes almost irrelevant
- d. Digital services seeing an increase in demand

Poignant quotes

“A radical change in the way that we work. The size and scale of the home working 'experiment' - which would never have happened without the pandemic, has proven that most roles can be performed effectively from home. In fact, often more effectively.”

“Feeling confident that we've been able to adapt to unprecedented circumstances and therefore moving forward we will be less risk-averse when it comes to committing to new initiatives.”

“Focus on new business and efficiency. We're leaner and fitter than we were in March.”

“Access to better candidates due to greater flexible/remote working”

Summary

In the marketing, digital and creative sectors we tend to have a generally optimistic bunch and these survey results support that premise. It seems that we are, in the main, tackling the issues surrounding the pandemic head on and making brave and bold decisions quickly rather than kicking the can down the road. We are adapting faster than ever and in doing so, are changing working practices for the better.

For all of the challenges this pandemic has thrown at us, perhaps, just perhaps, we will all emerge from this a little battle scarred but in a better position for it.

From all at Network Marketing and The Book, we wish you every success and are here to help when needed. Please call Jonathan Hirst for more information on 0113 2469605.