The current position and future recovery of the Live Events Sector

December 2021 Survey Report
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PLASA is the lead international membership community and association for the event technology, technical entertainment, and installation industries.

The association works to ensure that each sector is fully represented and promotes best practice and safe working conditions. PLASA supports its members across business, technical and safety, and offers certification and training for entertainment riggers and production technicians.

PLASA’s commercial divisions support the association’s activities: Print and digital editions of LSi and LSA lead the market and are read in 120+ countries, while PLASA Show and PLASA Focus Leeds provide businesses opportunities to showcase technology and services.

The association also works actively with its members through the Membership Governing Body and specialist working groups, allowing members to share knowledge and grow their business.

www.plasa.org

#WeMakeEvents was originally launched by PLASA in April 2020 in response to the impact of COVID-19 on the live sector.

The campaign developed into a cross industry collaboration of over 20 industry organisations along with several companies and freelancers.

This led to the ‘Red Alert’ day of action on 11 August 2020 in the UK, followed by a global movement on 30 September 2020 in 25 countries, from New Zealand to Canada.

Since then, #WeMakeEvents has staged several outside events and digital campaigns to ensure the vibrant and viable live sector is not forgotten and gains meaningful support.

Behind the scenes, the team continue to communicate with government officials and contribute to important conversations on the future of live events and entertainment.

www.wemakeevents.com
This survey was carried out by PLASA and #WeMakeEvents to collect data on how live sector professionals continue to be impacted by the Covid-19 pandemic.

A sum total of 1,948 respondents completed the survey. Between 1 November and 21 December 2021, therefore excludes the recent impact of the Omicron variant.

PLASA and #WeMakeEvents would like to thank everyone who took the time to complete this survey, as well as the international partners who helped to distribute the survey in Spain, Italy, Poland, Slovenia and the USA. We acknowledge that several key countries are absent.

The following valuable insights will help to paint an accurate picture of how the live events, entertainment and installation industries coped with the return of live events throughout 2021.

Plus, the survey reveals the complex challenges still facing companies and individuals who work throughout the live events supply chain around the world.

The complete data has been provided alongside analysis provided by an industry panel. Readers are invited to present this data to their local government officials.
The unparalleled lockdowns throughout 2020 and 2021 resulted in an significant reduction in turnover for businesses operating throughout the Live Events industry, which led to 45% of companies taking on debt. Additionally, the lack of work prompted an exodus of freelancers, with 64% finding work in other sectors. Looking ahead, respondents lack confidence in industry recovery over the next six months, with optimism somewhat increasing in the long term, demonstrating our industry’s viability and resilience.

A strained supply chain

The findings indicate that 95% of manufacturers are experiencing component shortages. This appears to have had a knock-on effect down the supply chain, with 70% of non-manufacturing companies experiencing a delay in finished goods – the vast majority of each being impacted in some way.

“Availability is getting worse at present; lead times are over a year in some cases. The largest price increases come from alternate source/excess inventory sourcing where it’s necessary to maintain continuity of supply” - Page 22

“Design a job, price it, issue quote, eventually accepted, go to order goods, some items unavailable, re-design job, re-issue quote, quote accepted, go to order goods, items unavailable, and round in circles we go!” - Page 29

A pronounced skills shortage

69% of companies reported a skills shortage, with site crew, riggers, engineers and technicians the most cited. To exacerbate this issue, 50% of freelancers have not returned full time to the industry, and there is a trend of companies having a lack of confidence in industry-relevant university courses. Collectively, these issues raise concerns that there is no quick solution, particularly as 38% of companies report needing to take on apprentices or new entrants in seven to 18 months’ time.

As a result of the shortage, approximately a third of companies will need to delay work, and a further third will have to cancel work all together. It takes time to attain and develop the skills needed to work safely and productively in the live events sector, so it is unsurprising that 74% of employers are doubtful about the availability of skilled workers as planning begins for the traditionally busy summer season.

“A lot of excellent people with years of skill and knowledge have left the industry. They knew it, understood it and made it work, things you only learn over a long period of time.” - Page 37

“We regularly take on graduates as part of our training programme ... Generally, it takes us 6 months+ to get them to a standard where they’re worth employing” - Page 37
An uncertain future for freelancers

Freelancers and companies have always had a symbiotic relationship, however the findings indicate that there has been a reduction in the use and availability of freelancers. The number of full-time freelancers has dropped by **52%**, with an increase in freelancers working part time. This could explain the aforementioned skills shortage, in particular the high volume of on-site roles.

Moreover, work security has taken a hit and there is reluctance to return to the Live Events industry and instead maintain roles in other sectors. The findings indicate that planning and lead times are much shorter, with an increase in those with no work at all and a reduction in those with work planned for a year ahead. Additionally, touring abroad has dropped by **60%**, and **63%** are doubtful about working abroad in the coming months.

*“Everything seems very last minute, and personnel are in a massive state of flux... There’s fewer long term bookings.”* – Page 46

*“We are facing the greatest crew shortage I have seen in 26 years... The film sector has been bolstered by large numbers of touring crew many of who do not plan to return. Furthermore there are no new techs....This can’t be solved by rate increases alone.”* – Page 46

*“Doubt in security of the industry fully coming back and re-evaluation of career...”* – Page 43

The bottom line

The Live Events sector is dynamic and complex. Respondents in this survey tell us that the vast majority of companies have been impacted by delays throughout the supply chain, with the lack of components and goods affecting **97%** and **90%** respectively. Furthermore, as a result of the skills shortage, a third of companies will have to delay work and a third will be forced to cancel work all together. To compound the issue further, **50%** of the industry’s freelancers have yet to return full time. Many comments implicate Brexit, but with Covid-19 restrictions, the true impact of this is not yet known.

Figures from pre-pandemic reports indicate that the UK Live Events workforce was made up of approximately **72%** skilled freelancers in 2019 and that the live events industry contributed **£70 billion** to the economy in the UK alone. Therefore, we can deduce an estimated global contribution of billions to worldwide economies, plus much more if the financial income from associated industries, such as the travel, leisure and hospitality, are included. This not only demonstrates the economic value of Live Events, but also shows that with further financial support from governments, the sector is a good viable investment.

There is clear evidence of shortages in components, goods and skilled workers, as well as a lack of confidence in industry recovery within the next six months. And although there is cautious optimism from seven months onward, many companies will be burdened by debt, and many job roles may remain vacant. The bottom line is that the ongoing challenges facing the Live Events sector, as outlined in this report, could further impede economic growth. And even though the public is keen to make up for lost time, there is a real potential for these restrictions to result in losing a large number of awe-inspiring experiences that the Live Events sector is renowned for.

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1. Music by Numbers 2020
2. BVEP report
Financial strain on SME companies and organisations:
• 45% of businesses took on additional debt.
• The number of businesses that turned over less than £50,000 grew by 56%
• Over half predict their turnover will stay the same or decrease this tax year.
• 70% lack confidence about importing and exporting in the short term future.

Challenges facing manufacturers:
• 94% are experiencing delays in components such as microchips, metals and cables.
• The causes involve congestion at ports and a lack of materials, and many in the comments cite a fire incident in a factory and high demand for production.
• Over half expect less turnover, 64% will source new suppliers, 48% will redesign products.

Delays in finished manufactured goods:
• 70% are experiencing delays in goods such as lighting fixtures, mixing desks and speakers.
• Delays are said to be caused by a lack of materials, staff shortages, congestion and Brexit.
• As a result, 73% anticipate a decline in work and loss of sales.
• All products have seen an increase in cost.
• 62% lack confidence in availability of goods in the short term future.

The availability of skilled workers:
• 69% are experiencing a skills shortage.
• A third of companies will have to delay work and a further third will have to cancel work.
• The majority of shortages are occurring with on-site workers.
• Over a third are having to retrain engineers and technicians.
• 74% lack confidence in availability of skilled workers over the coming months.

Challenges facing our industry’s freelancers:
• Earnings of less than £10,000 has jumped to 56% and top earners have dropped by 78%.
• 30% predict a decrease in earnings in 2022.
• 64% had to find work in other sectors, and 17% found work in Film & TV.
• Half have returned full time. Full-time freelancers have dropped by 52%.
• Lead times have reduced, with an increase in those with no work at all and a reduction in those with work planned for a year ahead.
• Touring abroad has dropped by 60%, with 63% lacking confidence in working abroad.
Respondent overview
In what country do you live?

This chart only shows the top 16 countries out of 48.

- UK 65%
- Poland 9%
- USA 6%
- Italy 6%
- Slovenia 3%
- Spain 3%
- Ireland 1%
- Germany 1%
- Australia 1%
- UAE 1%

Which best describes your business category?

The chart below represents 1,156 respondents from companies and organisations. In addition to this, 792 freelancers took the survey.

- Logistics/Transport/Catering 2%
- Distributor 5%
- Manufacturer 8%
- Installer/Consultant/Professional Services 16%
- Venue 18%
- Rental/Production/Events 46%
- Other 5%
Unemployment rose to 3% since the pandemic, and the number of freelancers dropped by 12%. However, most people’s working status remains unchanged by Covid-19.

### Your main working status in the year before the pandemic and now

<table>
<thead>
<tr>
<th>Working Status</th>
<th>Before Covid</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>Freelancer/Sole Trader</td>
<td>30%</td>
<td>38%</td>
</tr>
<tr>
<td>PAYE Employee</td>
<td>30%</td>
<td>31%</td>
</tr>
<tr>
<td>Company Owner/Director</td>
<td>24%</td>
<td>22%</td>
</tr>
<tr>
<td>One Person Limited Company Director</td>
<td>11%</td>
<td>11%</td>
</tr>
<tr>
<td>Student</td>
<td>3%</td>
<td>2%</td>
</tr>
<tr>
<td>Retired</td>
<td>1%</td>
<td>2%</td>
</tr>
<tr>
<td>Unemployed</td>
<td>0%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Your company business profile
Your approximate turnover for tax years ending 2020 and 2021

Turnover reduced throughout the pandemic. The number of businesses that turned over less than £50,000 jumped by 56%.

The forecast increase or decrease of turnover for tax year ending 2022

Over half of respondents predict their turnover will either stay the same or decrease in the coming tax year. The majority of those who predict their turnover will increase think it will do so by up to 50%.
The number of businesses currently using zero employees and freelancers has grown 29% and 75% respectively. The 1% drop in companies employing 251+ employees and freelancers alone translates into an estimated loss of 5,000 jobs.
45% of businesses took on debt during the pandemic. More investigation is needed as to whether the 34% who did not apply for a loan either did not fit the eligibility criteria or received grants instead.

Has your business obtained loans during the pandemic?

- **Yes – we received a NON-government-secured loan**
  - 6%

- **Yes – we received a government-secured loan**
  - 26%

- **Yes – we received a NON-government-secured loan and a government-secured loan**
  - 13%

- **No – we were turned down for a NON-government-secured loan**
  - 4%

- **No – we were turned down for a government-secured loan**
  - 3%

- **No – we were turned down for a NON-government-secured loan**
  - 2%

- **No – we did not apply for a loan**
  - 34%

- **Don't know**
  - 11%
Does your business operate internationally, if so in which regions?

The live events supply chain is truly global – 87% of respondents operate across Europe, 31% in North America and 24% in the Middle East. These figures align approximately with the 1,258 respondents who are based in the UK.

How confident are you that the ease of importing and exporting will increase in the short-term and long-term?

70% are not confident about importing and exporting easing in the short-term (0-6 months), with an approximately equal number of confidence and no confidence in the long-term (7-18 months).
The availability of manufacturing components
The overwhelming majority of manufacturers are experiencing delays in the supply of components. Of the 22% in the Other category, many commented on a specific fire in a microchip factory and high demand for production.

What do you think are the reasons why components are delayed?

The overall issue is logistical, with a variety of factors leading with congestion at ports and a lack of materials. Plus, staff shortages may have caused delays. Of the 22% in the Other category, many commented on a specific fire in a microchip factory and high demand for production.

- Congestion at ports: 69%
- Lack of raw material: 54%
- Staff shortages: 44%
- Brexit rules on import/export: 35%
- Cost of raw material: 29%
- Reduced air cargo space: 28%
- Covid-19 travel restrictions: 22%
- Other: 22%
There are delays across the board. The most delayed component are microchips reported by 68% manufacturers, a quarter waiting over 24 weeks for delivery. Metals and cables are also reported as delayed.
How will the delay in components affect your business in the short-term and long-term?

The vast majority of manufacturers will be impacted. Over half expect a reduction in turnover, in the short-term (0-6 months) and long-term (7-18 months). In the short term, 64% will source new suppliers and 48% will redesign products, both of which could cause delays and drive up costs.
Since the start of the pandemic, have any components increased in cost?

The majority of manufacturers are reporting that these essential components have increased in cost. Metals are highly affected, with 62% citing steel and 53% citing aluminium. Microchips have also increased, with 10% reporting a spike of over 91%. With living costs said to have risen by 5% in the UK, this graph suggests cost increases that are several times the rate of inflation.
74% are not confident about the availability of components in the short-term (0-6 months), with 32% still not confident in the long-term (7-18 months), suggesting that recovery of the supply chain is seen as a long term solution.
Comments on the current availability of components

• Availability is getting worse at present. **lead times are over a year in some cases.** The largest price increases come from alternate source/excess inventory sourcing where it’s necessary to maintain continuity of supply.

• In some cases we have found components in far-away locations and paid **exorbitant shipping costs** to get them to the USA. Component cost was typical, but add shipping and the net cost is much higher.

• **Increased freight cost and shortage of drivers** continue to affect our business

• It is looking like it will get worse over the next six months.

• **It will kill us if we can't get components.** We have bought all 2021 ICs and are attempting to buy all 2022 ICs but some are simply not available.

• It's hard to know which problems are caused by Brexit and which by Covid. I suspect it's often both.

• It's the time finding suppliers that have stock that is taking time

• **Sourcing materials is a time consuming battle** taking volumes of time and costing us money.

• There may be other reasons it could still get worse or better. **Covid, Brexit, global Infections, economy and environment.**
The availability of manufactured goods
Are you currently experiencing delays in finished manufactured goods?

69% of companies are currently experiencing a delay in finished manufactured goods. This is a slightly improved figure compared to the 95% of manufacturers facing component delays.

What do you think are the reasons why goods are delayed?

Lack of material is the most cited reason, followed by staff shortages, congestion and Brexit. Several ‘Other’ comments point to an international chip shortage and increases in shipping costs.
There are delays across the board: lighting fixtures are the most reported item, with 28% waiting between 5-12 weeks; mixing desks are delayed by over 12 weeks according to 15% of respondents; speakers and monitors are taking 5-12 weeks according to 21% of respondents. All of these items are technically very complex and unique to the industry.
73% of respondents expect to be impacted by the delay in goods in the short-term (0-6 months) and 60% in the long-term (7-18 months). Leading concerns are a decline in production, loss of turnover, redesigning products and sourcing suppliers.

<table>
<thead>
<tr>
<th>Option</th>
<th>Short term</th>
<th>Long term</th>
</tr>
</thead>
<tbody>
<tr>
<td>We will have to decline productions or sales opportunities</td>
<td>37%</td>
<td>33%</td>
</tr>
<tr>
<td>We will have reduced sales turnover</td>
<td>34%</td>
<td>35%</td>
</tr>
<tr>
<td>We will have to redesign elements of our products</td>
<td>33%</td>
<td>30%</td>
</tr>
<tr>
<td>We will have to source new suppliers</td>
<td>32%</td>
<td>23%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>29%</td>
<td>18%</td>
</tr>
<tr>
<td>We will have to delay the launch of new products or services</td>
<td>13%</td>
<td>12%</td>
</tr>
<tr>
<td>My business will not be impacted</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>We will have to reduce/cut apprenticeship schemes</td>
<td>7%</td>
<td>5%</td>
</tr>
<tr>
<td>We will have to cancel advertising and/or trade shows</td>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>We will have to make staff redundancies</td>
<td>5%</td>
<td>4%</td>
</tr>
<tr>
<td>We will have to take out loans</td>
<td>2%</td>
<td>4%</td>
</tr>
<tr>
<td>We will have to sell/let our premises</td>
<td>1%</td>
<td>1%</td>
</tr>
<tr>
<td>We will have to close down</td>
<td>1%</td>
<td>3%</td>
</tr>
</tbody>
</table>
Since the start of the pandemic, have any goods increased in cost?

All companies indicate an increased cost of goods, with most products increasing up to 20%.
62% of companies that ship goods to customers have experienced delays.

62% are lacking in confidence about the availability of products in the short-term (0-6 months), with 32% still not confident in the long-term (7-18 months) – demonstrating that industry recovery is considered a two-year journey.

<table>
<thead>
<tr>
<th>Confidence Level</th>
<th>Short term</th>
<th>Long term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all confident</td>
<td>23%</td>
<td>6%</td>
</tr>
<tr>
<td>Not very confident</td>
<td>39%</td>
<td>26%</td>
</tr>
<tr>
<td>Somewhat confident</td>
<td>31%</td>
<td>16%</td>
</tr>
<tr>
<td>Quite confident</td>
<td>19%</td>
<td>7%</td>
</tr>
<tr>
<td>Very confident</td>
<td>6%</td>
<td>2%</td>
</tr>
<tr>
<td>Don't know</td>
<td>12%</td>
<td>12%</td>
</tr>
</tbody>
</table>
Comments on the current availability of finished manufactured goods

• Current supply chain is broken, just in time is now an obsolete practice - how quickly can international business adapt to new ways of working. Will more LED manufacturers have plants outside of mainland China for example?

• Design a job, price it, issue quote, quote eventually accepted, go to order goods, some items unavailable, re-design job, re-issue quote, quote accepted, go to order goods, items unavailable, and round in circles we go!

• Global stoppage for Covid means everything is in the wrong place and re-starting importing pieces from abroad has delays and impacts globally.

• In general companies just push supply to the bigger outfits and the smaller guys have to wait.

• It’s a car crash. And it’s a Brexit amplified car crash. We are moving some operations to the Netherlands as the UK is an economic basket case now.

• Last minute inventory is gone and people stopped stocking stuff which is a real problem currently when demand is higher than manufacturers can produce stuff.

• We’re losing clients as they do not understand the issue.

• Shipping and haulage costs, delays and staff shortages are our single largest risk to our manufacturing outside the UK.

• Slightly unsure of quality. Not bad, but poorer quality. This may be due to staff changes. Nothing actually wrong, but just not as nice nor as neat and carefully wired and assembled as previously.

• The Day-to-Day, Face-to-Face hire business has been destroyed, I see no return to the Pre-March 2020 workload anytime in the next 2 years.

• The UK is a lot worse off because of Brexit. Everything is getting more expensive and the costs of importing have quadrupled (and more) and take a lot more time.

• Unknown lead times make it impossible to bid jobs, so we don't even bother trying.
The availability of skilled workers
Is your business currently experiencing a shortage of skilled workers?

69% of company/organisation respondents are experiencing a skills shortage.

How will the lack of skilled workers affect your business in the short-term and long-term?

In the short-term (0-6 months), approximately a third will have to delay work, and a further third will have to cancel work all together. In the long-term (7-18 months), 38% intend to hire new workers.
The majority of shortages are occurring with ‘onsite’ workers – most of whom are freelancers. Half of respondents report a lack in site crew, 47% lack skilled engineers and technicians, and 30% report a lack of riggers.

Possible reasons for these shortages are evidenced on page 40 which shows that 64% found work outside of the industry during the pandemic. Plus only half have returned to the sector full time, as shown on page 41.
Where did your business recruit people from pre-pandemic?

Word of mouth is the most commonly used method to recruit employees and freelancers, particularly ‘on-site’ workers.
What percentage of your workforce was recruited locally, nationally and internationally, before the pandemic and now?

Overall, the rates of recruitment locally, nationally and internationally have dropped since the pandemic. However, most continue to recruit locally for the majority of their workforce.
In what areas of your business are you having to retrain or up-skill workers?

This question yet again shows the lack of ‘on-site’ workers. Over a third are having to retrain engineers and technicians, and an additional 30% for site crew.
As an employer do you agree with the following:

*Graduates from university courses that are relevant to our industry have the right skills and knowledge and are ‘ready to work’?*

Only 10% of respondents agree that graduates are “ready to work”.

How confident are you that the availability of skilled workers will increase in the short-term and long-term?

74% of respondents lack confidence in the short-term (0-6 months), with 44% still lacking confidence in the long-term (7-18 months).
• A lot of excellent people with years of skill and knowledge have left and the industry. They knew it, understood it and made it work, things you only learn over a long period of time.

• Brexit is causing issues employing people from outside of the UK. Visas are costly.

• Due to a lack of training relevant to the live industry, we set up our own in house training...This has ensured that the people that graduate have the skills necessary to deliver safe, competent and professional services to our clients. The vast majority of our trainees have found employment and many have become renowned engineers

• Freelance status now needs to be reviewed to attract new talent; the instability of the sector has been shown to be unreliable in the face of unknown crises.

• Good/experienced people have left the industry for better pay and conditions. We need to look at less labour intensive practices to help with this shortfall.

• Graduates are only of use if they had hands on experience of real world situations and a love of the industry.

• Workers are selective. Amazon has changed the completion of the lower wage labour market. We have raised entry level wages substantially but it is still not enough.

• It is putting more pressure on the skilled workers to support the non-skilled workers.

• It takes time (years) for crew to gain experience and knowledge. Crew lost cannot be replaced if the work which gives this experience is not there. This leads to a less skilled and less able workforce. Chicken and egg problem!

• Many freelancers have either left the industry all together or have moved into film and drama with shorter hours and more generous pay.

• Minimum wage needs to be capped for a few year so we can employ more people to grow the business instead of paying a small amount of people a lot of money.

• More training, apprenticeships and on the job work experience. Outreach programmes to secondary schools aligned with other industry bodies to maximise awareness of career options within the industry.

• The industry requires proper recognition to help support the value of the jobs available within it

• There is currently too much work for the amount of technical crew available. Specialist staff are still leaving the industry for different careers which have more normal working hours.

• Older workers with families are seriously considering staying at home permanently after this forced change in lifestyle...It is a very common conversation currently in this age group with many unsure if/how/when they will re enter the industry, or if they even want to.

• We have an aging workforce in many areas of the industry. We have poorly defined career paths for recruits. The industry is neither diverse nor inclusive making it an unattractive place to work for many communities. We had an over dependence of EU workers. We have a poor track record on welfare and wellbeing. We are too reliant on freelancers who weren't supported during the pandemic and many have left and unwilling to return.

• We regularly take on graduates as part of our training programme and without exception they have no clue whatsoever about what it's like to work in the real world. Generally it takes us 6 months+ to get them to a standard where they're worth employing.

• We’re not in a position yet to hire extra staff. Therefore current staff are working more hours.
Our industry’s freelancers
Your approximate net income from work in the live sector for tax years ending 2020 and 2021

The number of people reporting earnings of less than £10,000 has jumped to 56%, and top three tiers of earners have dropped by 78%, indicating the devastating economic impact on the freelance community.

The forecast increase or decrease of net income from the live sector for tax year ending 2022

30% predict a decrease in earnings in 2022, with 47% predicting either the same or an increase of up to 50%, which could not be much considering the drop in earnings in the chart above.
64% had to find work in other sectors. 17% found work in film & TV. Several comments reported parcel delivery, Covid test centres, or diversifying into streaming/virtual events.

Did you work in other sectors during the pandemic?

- I remained working in the live sector: 36%
- Other: 18%
- Film & TV: 17%
- Retail/Sales: 11%
- Building/Construction: 11%
- Transport/Haulage: 8%
- Education/Teaching: 7%
- Arts/Media/Design: 7%
- IT/Computing: 6%
- Warehouse/Industrial: 6%
- Health Care/Social Care: 5%
- Factory/Manufacturing: 3%
- Customer Service/Call Centre: 3%
- Agriculture/Environment: 3%
- Security Services: 1%
Half of respondents are not yet back working in the live sector full time. The left side of the chart below portrays the industry’s significant skills shortage.

- 50%: Yes - I am now working full time in the industry
- 33%: Yes - I am now working part time in the industry
- 14%: No - I do not intend to return to the industry
- 14%: No - but I plan to return to the industry

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Have you renewed your public liability insurance this year or plan to soon?

- 64%: Yes
- 22%: No
- 14%: Not applicable
For those who have returned to the live sector, what roles have you found work?

66% of respondents are back working in the live sector as ‘on-site’ workers such as technicians, riggers or casual crew staff. Several comments refer to streaming/virtual events, tour management and corporate events.

- Engineer/Technician: 41%
- Production Management: 20%
- Creative/Design: 16%
- Rigging: 13%
- Other: 13%
- Site Crew: 12%
- Project Management: 11%
- Electrician: 11%
- Stage Management: 10%
- Systems Integration: 6%
- Educational/Training: 6%
- Logistic/Driver: 4%
- Health & Safety: 4%
- Administration: 3%
- Warehouse/Packing: 3%
- Software Engineering: 2%
- Manufacturing: 2%
- Sales & Marketing: 1%
- Catering/Hospitality: 1%
• Because the wages have gone down, and the workloads have increased. Many jobs are asking you to do two jobs in one and there is no guarantee they won't close again.

• Doubt in security of the industry fully coming back and re-evaluation of career and life goals.

• Found work life balance better in the new role, now that I have family.

• Good time of life to retire.

• I am extremely clinically vulnerable and am anxious around touring and being in venues etc. I have a useful part-time job, working from home for the local council which suits at the present time.

• I can earn a better living in film and TV.

• I worked in the industry for over 12 years as a sound engineer and AV tech. It was my life. But when Covid happened, I lost all my work and everything I was offered was hybrid work/streaming for reduced rates and I could see the future of events for a great amount of time being this way. I couldn’t afford to pay my mortgage and remain living in London working as a sound engineer. The first job I got in London was with one of the largest audio rental houses, where I did 60+ hours a week all the time. I was paid significantly less then the traineeship I am doing now in the IT sector (that I have no experience in) And I’m re-training to earn better money and do less hours, I left because companies take advantages of freelancers. Honestly in terms of wages and hours, why would anyone in their right mind work in events right now?

• Not enough work to sustain.

• Now fully retired at age 74. Without Covid I would have continued. All equipment being sold or scraped. No industry help!

• Simply the work is not there and possibly will not recover. I can’t survive on a 3 week UK tour and dabble over the next 6 months doing an odd show elsewhere waiting on a festival season that may or may not happen. Went from having many calls for tour manager to literally nothing in over a year.

• Taken a full-time PAYE role within a drama school.
How many hours per week did you work in the industry before the pandemic and now?

There has been a significant drop in the numbers of hours worked. The number of full time freelancers (40+ hours) has dropped by 52%, with an increase in people working part time.

How many weeks in the future did you have work booked before the pandemic and now?

Lead times are much shorter now, with an increase in respondents with no work and a reduction in work planned in the long-term.
How many miles did you have to travel to each job before the pandemic and now?

The number of people touring abroad has dropped by 60%, with an increase in respondents working from home.

![Bar chart showing the number of miles travelled before and after Covid.

<table>
<thead>
<tr>
<th>Distance</th>
<th>Before Covid</th>
<th>Now</th>
</tr>
</thead>
<tbody>
<tr>
<td>0/0/WFH</td>
<td>14%</td>
<td>4%</td>
</tr>
<tr>
<td>1-10</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>11-50</td>
<td>19%</td>
<td>17%</td>
</tr>
<tr>
<td>51-100</td>
<td>16%</td>
<td>15%</td>
</tr>
<tr>
<td>101-200</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>201-300</td>
<td>3%</td>
<td>4%</td>
</tr>
<tr>
<td>301+</td>
<td>8%</td>
<td>5%</td>
</tr>
<tr>
<td>Touring abroad</td>
<td>30%</td>
<td>12%</td>
</tr>
</tbody>
</table>

How confident are you that the ease of travelling and working abroad will increase in the short-term and long-term?

63% are not confident about being able to work abroad in the short-term (0-6 months), with 40% still not confident in the long-term (7-18 months).

![Bar chart showing the level of confidence before and after Covid.

<table>
<thead>
<tr>
<th>Confidence Level</th>
<th>Short term</th>
<th>Long term</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not at all confident</td>
<td>34%</td>
<td>16%</td>
</tr>
<tr>
<td>Not very confident</td>
<td>29%</td>
<td>24%</td>
</tr>
<tr>
<td>Somewhat confident</td>
<td>22%</td>
<td>14%</td>
</tr>
<tr>
<td>Quite confident</td>
<td>19%</td>
<td>10%</td>
</tr>
<tr>
<td>Very confident</td>
<td>10%</td>
<td>2%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>8%</td>
<td>7%</td>
</tr>
</tbody>
</table>
Supply and demand should increase our daily rates but that never seems to happen with wages. All I’m hearing is there’s less money due to Covid, but two shows in one day are happening with crew on a single daily rate.

Around 20% of my work is now cancelled. Often with enough notice that I will lose out on payment, but near enough that I often cannot replace that work. Cancellations make work in the live sector somewhat unreliable.

As a female worker all my clients have dropped me as they think I cannot work from home with children. I have been juggling children as a director for 11 years, no problem.

The fear of catching Covid, despite having had the jabs, still leaves doubts. I’ve noted a lack or loss of custom to some venues because this. Also, the last 4 Genesis concerts cancelled due to Covid within the touring team. This will have an impact for years to come.

Events now require a streaming element meaning more techs required on site as well as extra techs off site. The sector is struggling to keep up with demand. New starters are now joining the industry and being confirmed for work they previously wouldn’t be able to secure as a result of this.

Brexit has created issues for the free movement of UK touring crew around the EU. Some sort of Creative Passport would be amazing.

Climate awareness means a number of events that would have employed UK sector are now choosing local crew/suppliers to resolve climate policy issues.

Covid seems to be a blanket excuse for poor event organization and standards of conditions in the working environment seem to have decreased. The return to work has not been particularly enjoyable so far.

Currently on last 2 weeks of a US tour that was postponed by Covid. US tours with UK lighting systems are a rarity. I usually work in the EU. I have no EU work booked and expect massive competition for the UK work.

Being a single parent struggling there are very little options now and I’m contemplating give up working in events… I feel I have wasted my life in what is now a non-existent career and have no time or money to retrain.

Everything seems very last minute, and personnel are in a massive state of flux - being called to cover for someone, or things not being finalised until late on in the day. There's fewer long term bookings.

Greater demand for riggers as many have retired or moved to other employment. Overworked riggers are at risk of accidents due to fatigue.

I have no doubt that when my previous clients start to plan European tours for next year, they will be looking to hire European crew, as the ease (and therefore cost) of moving those people around is MASSIVELY smaller than that of UK crew.

I'm really concerned that by having to take TV and film jobs to ensure financial stability, I'll be locked out of previous festival and touring music roles.

It's clear that a lot of companies have lost full time staff and are looking at new ways of working - this has increased freelancer opportunities but not always matched with realistic fees.

Pay and conditions are sufficiently bad that it is very difficult to be able to justify returning. I have applied for multiple positions which pay less than working full time for a supermarket.

The entire picture of audience attendance and confidence in being in crowded public spaces has changed out of recognition. Consequently, the profile of the industry is entirely unpredictable and with it the pattern of our future employment. This may be a golden opportunity, a severe threat, or the end of this industry in its current form.

There is a massive administrative burden that is distracting from other important safety matters.

There seems to be a lot of jobs being advertised currently, suggesting that a lot of people have left the sector and companies are struggling to fill roles, made worse by the fact that many of the jobs being advertised are at a much lower rate and for a much higher expectation on the person in each role.

There are far more roles than people, especially good experienced people who can get the job done without supervision. It’s a great opportunity for people to step up to the next level in their careers in ways they might not have had the chance to otherwise, but it also means safety is a concern with so many inexperienced people burning the candle at both ends.

We are facing the greatest crew shortage I have seen in 26 years in the industry. The film sector has been bolstered by large numbers of touring crew many of who do not plan to return. Furthermore there are no new techs we can throw in the deep end. This can't be solved by rate increases alone.
Appendix

This survey was translated and distributed in five languages, thanks to the support of international partners.

Please navigate to each of these surveys via the links below.

- Collated global survey data (in English)
- UK residents only
- Spanish survey
- Italian survey
- Polish survey
- Slovenian survey