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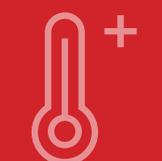
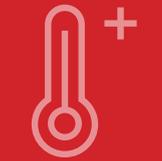
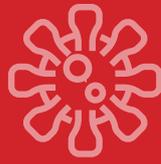
accelerating  
agencies

# You and Corona

The Pulse of the Communication Industry  
A SECOND VIEW

**06 MAY 2020**

FIELD 23/30 APRIL 2020



# We will survive this crisis

**The past few weeks have been hell for all of you, but despite of all the doom scenarios, most of you keep up the spirit and are working towards a “new normal”, re-inventing business models and re-shaping your agencies.**

## **It is really touching**

It is nice to see that, in times of crises, we stick together and we show more solidarity than ever before.

The Open Letter we wrote to all of you, on behalf of the event agencies who suffer the most, was spread massively and picked up by the press, resulting in a great response from the various governments.

Our Event Risk Model, – Scan and Code of Conduct are now being promoted as the reference tools to get live events back on track. And our offer to call upon our expertise, was accepted by Mr Weyts, who asked us “If we could arrange extra sanitary installations at schools by May 20th ?”

It is really touching to see how 10 event agencies offered their help and are now working together to produce, deliver and install sanitary installations in 2000 Flemish schools. No egos, no hidden margins, no PR for any of the agencies, one for all and all for one.

That is how we will survive this crisis. And a crisis it is.

## **The survey**

For the 2nd wave of the “You & Corona” survey, we invited all ACC members to participate. We received 117 answers that represent 130 of the 135 ACC members. I would personally like to thank you for your massive response.

The report is a mixture of despair and of hope. We have written some comments that will help you to read the graphs and bar charts correctly and to illustrate the differences between the various disciplines of the creative industry.

The entire ACC-team wishes you a fast recovery, in good health!  
Johan, Jurn, Stephanie and Twiggy

*PS.: A big thank to our Expert Center Content Marketing, aka Custo, for taking the initiative for this survey and turning it into a powerful report.*

*Thanks also for all who made this report possible: Pieter Vereertbrugghen, Bart Lombaerts, Dani De Ridder, Frank Anthierens and the ACC-team.*

*Photography: © Shutterstock*

# We remain positive

**A severe and massive reduction in activities. That is how we can describe the impact of the corona virus in our agencies. More than 80% of agencies saw activity decrease during the first six weeks of lockdown. The major differences per discipline are striking.**

It is worth taking a look at the graphs on page 10: the event agencies are taking the worst blow (almost every agency has a decline of 75% or more of their income). The situation looks a bit brighter for digital marketing and content agencies. Heavy deteriorations are rare and there are even some players who saw an increase of activity.

Broadly speaking, expectations for the coming weeks are in line with what the agencies have seen in recent weeks, although it is notable that the content agencies in particular expect the status quo may change to a slight decline.

Services that had a higher demand in recent weeks are content strategy, digital content, social media and online events. Live events dropped sharply. Other services are balanced (an increase in demand for some, a decrease in demand for others).

## **97% of all agencies put people on temporarily unemployment**

If there is less work, part or all employees are put in temporarily / economically unemployment. At the digital and event agencies it can be noted that there have already been layoffs (or contracts have not been renewed). The PR & influencer agencies often resort to the system of compulsory annual leave.

A fixed rule on temporary unemployment does not seem to exist: some agencies use the same percentage of time in temporary unemployment for all employees, in others the percentage varies from employee to employee or from department to department.

The proportion of companies that provide compensation is the largest at event agencies. This is striking, given the sector has been most affected.

## **Delayed and canceled projects cause headaches**

This corona crisis is confronting us with some unique challenges: uncertainty about the employees, uncertainty about the measures taken by the government, customers postpone their payments, ...

Nevertheless, it turns out that postponed and canceled projects are causing most headaches for agency managers. And that applies to all types of agencies. Furthermore, the uncertainty about governmental measures also plays an important role at the event agencies. Logical. They will likely be very limited in their activities for several more months.

## **Teleworking succeeds**

Working from home is and remains the rule, also at our agencies. Often only a few people occasionally go to the office, usually people in management roles. Here too, event agencies are the exception to the rule. Given the nature of the work, working from home is less obvious.

However, working from home doesn't have to mean reduced productivity. On average, 48% indicate that this decreases the productivity of the employees, but that figure is strongly influenced by the event agencies (who experience this reduction strongly). 33% of digital agencies even see an increase. The integrated agencies are at 17% increase.

### **The financial picture**

These evolutions unavoidably have a financial impact. We asked how long this situation could last before closing the year at a loss.

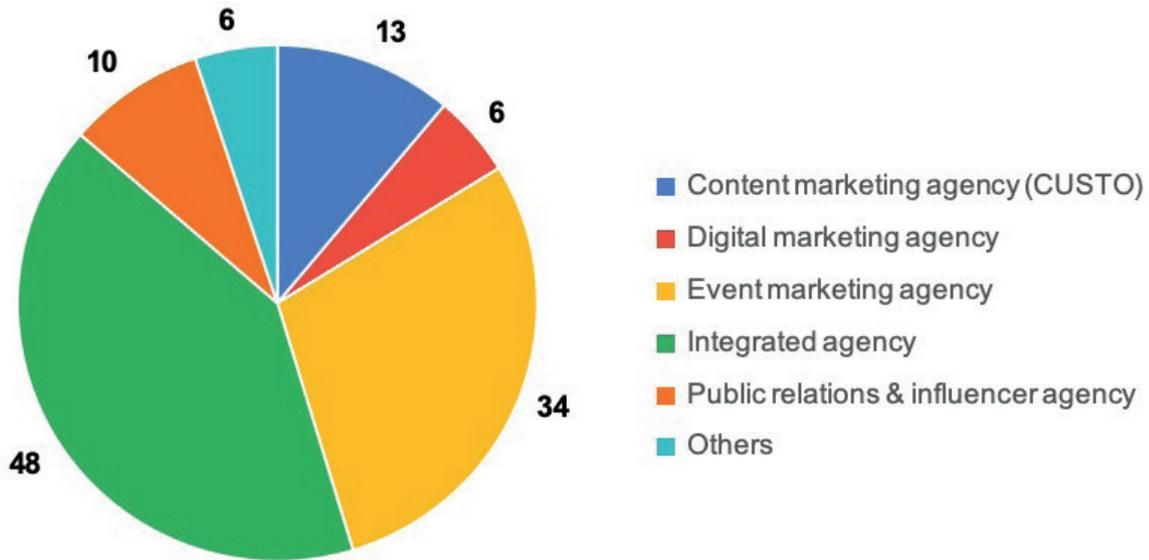
The answers vary a lot: 26% of the agencies can still keep it up for one to three months, 21% already provide red numbers for this year. The most positive echoes can be noted at the Content and PR & influencer agencies.

Almost everyone is positive about the end of the lockdown: more than 70% assume that we can return to the office in May or June. Communication people remain positive and that is important!

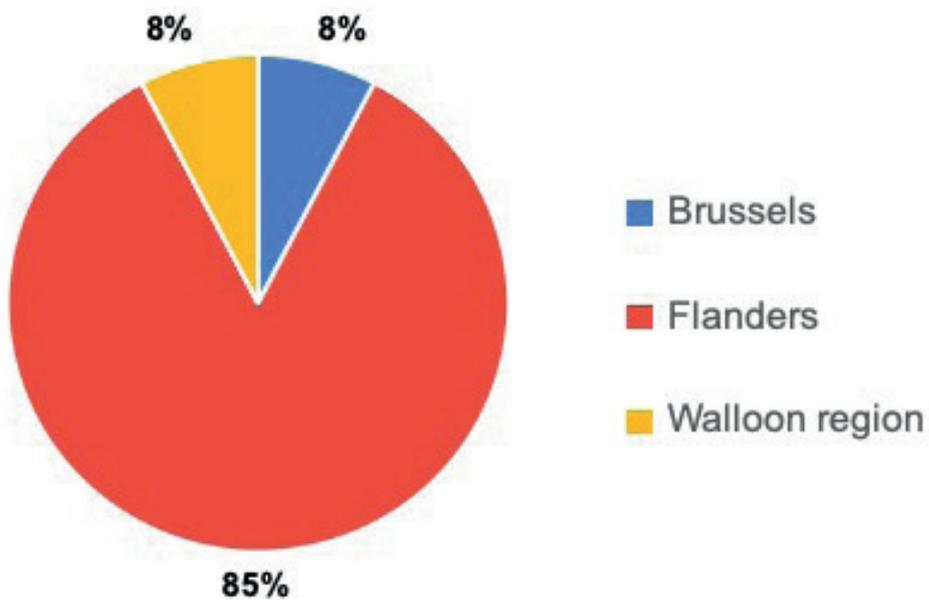


# COMPANY INFO

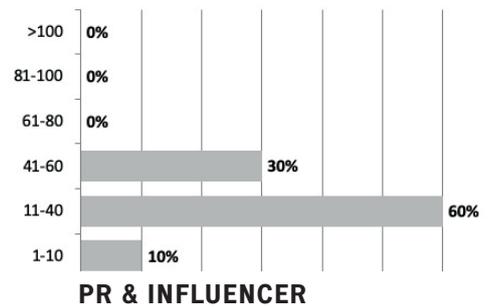
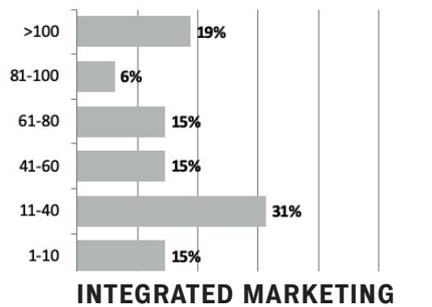
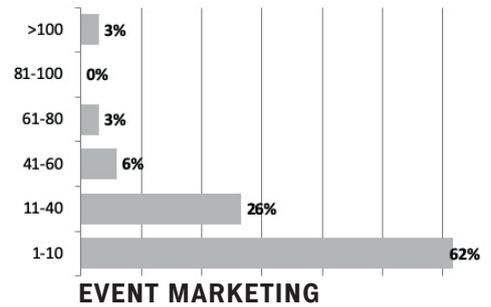
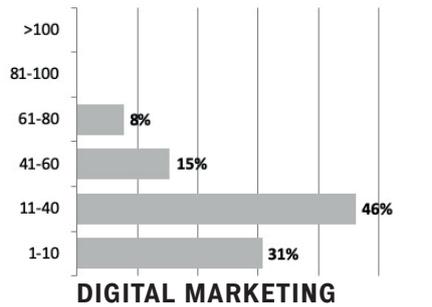
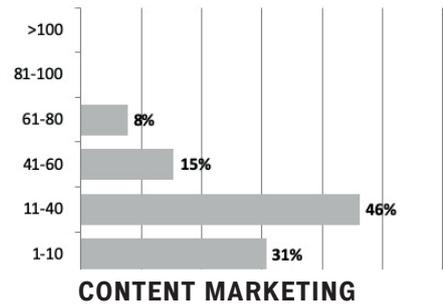
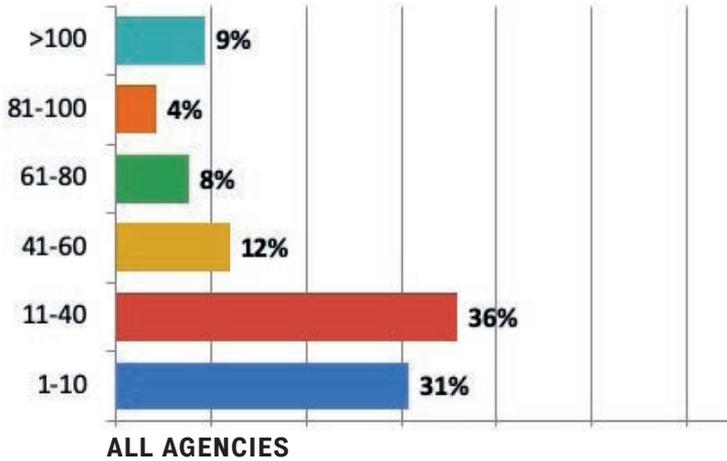
## HOW WOULD YOU DESCRIBE YOUR COMPANY?



## WHERE IS YOUR COMPANY BASED?



## HOW MANY FTE does your Company employ (incl. free lancers)?



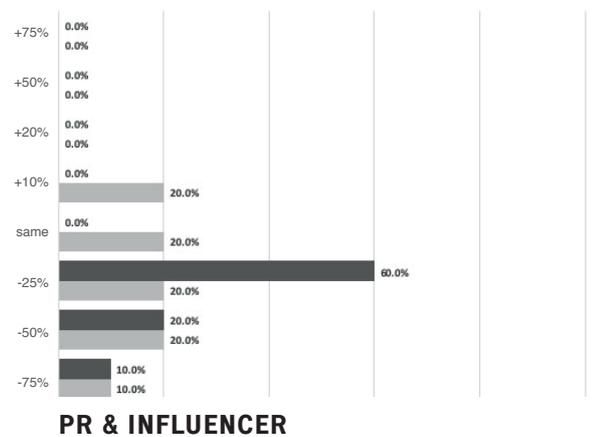
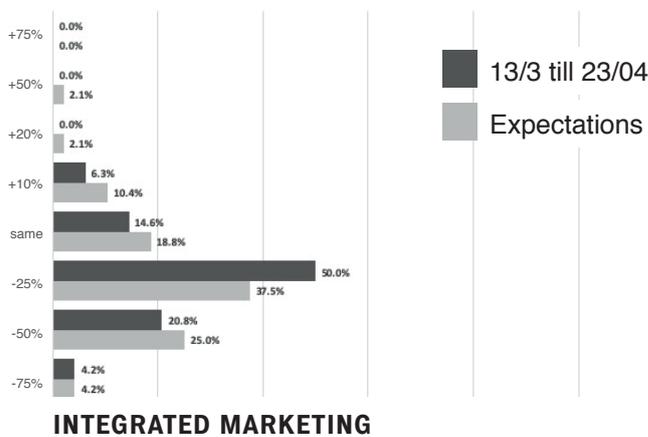
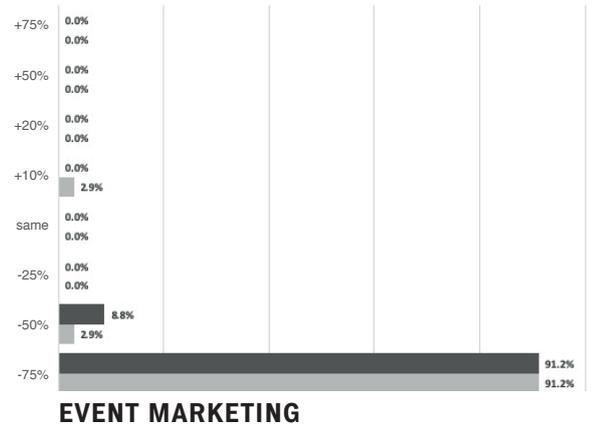
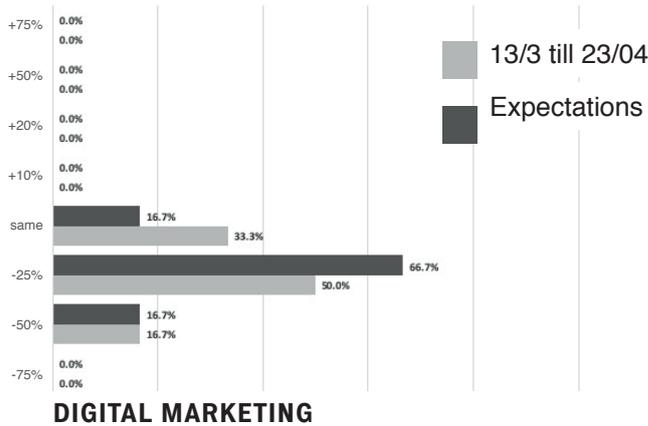
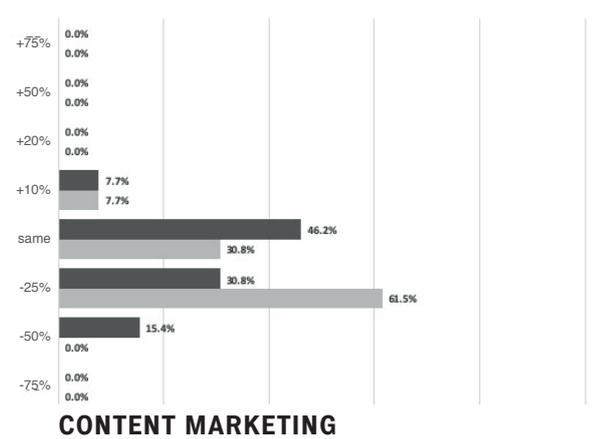
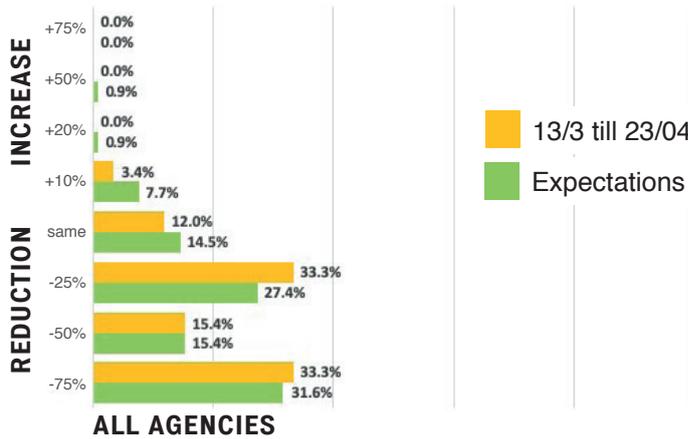




# IMPACT OF THE CORONA CRISIS

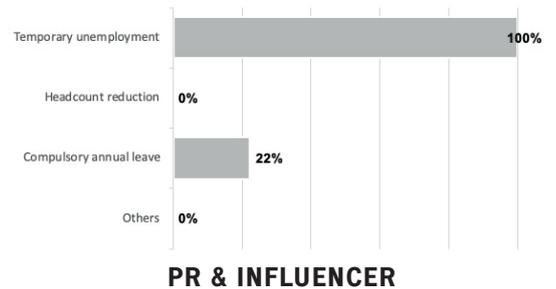
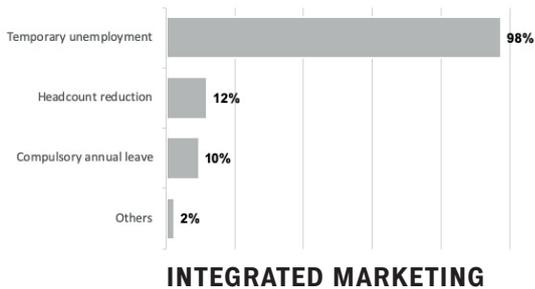
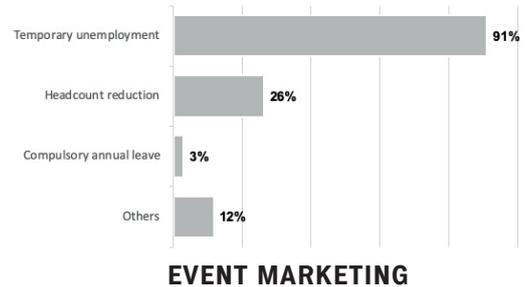
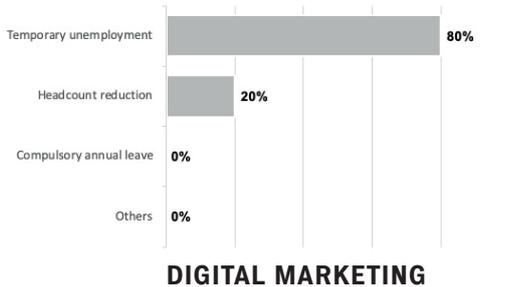
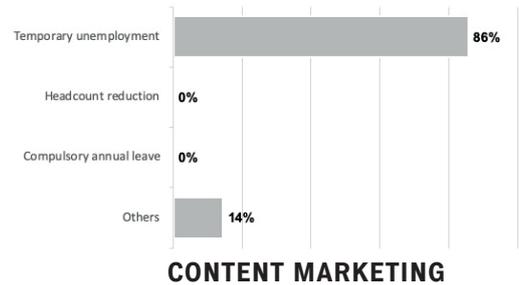
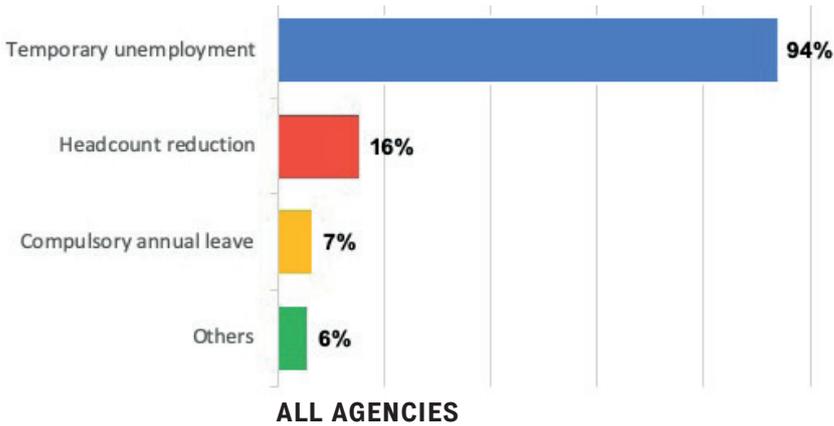
## EVOLUTION OF THE IMPACT

Compared to the period immediately prior to corona, what impact did corona have on your business between 13th March and 23rd April, and which impact do you think it will have during the coming weeks?



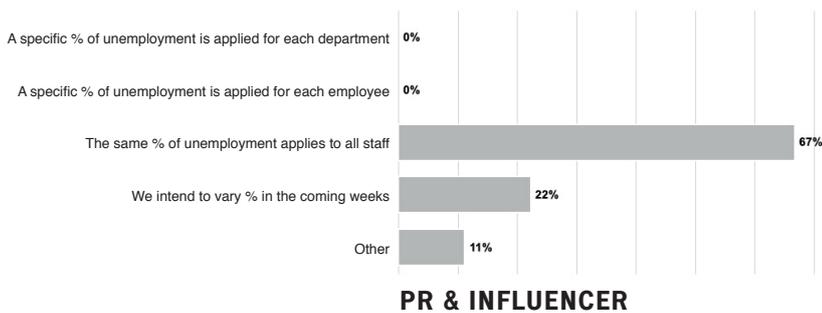
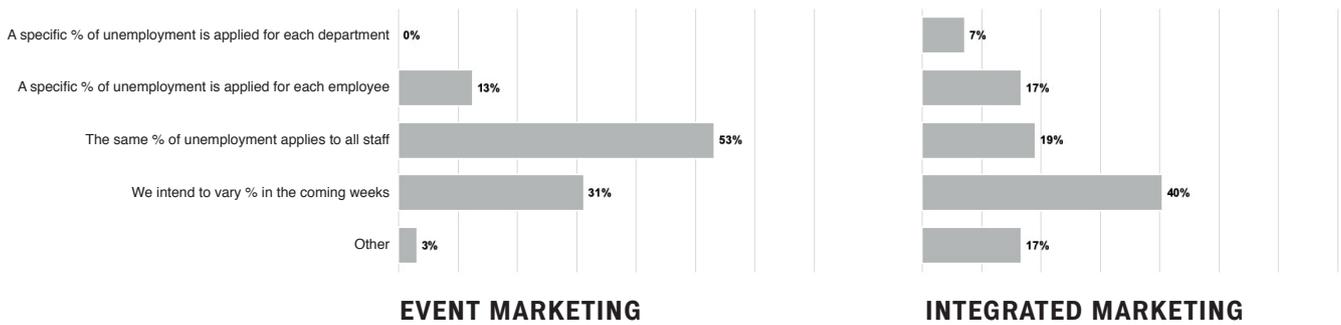
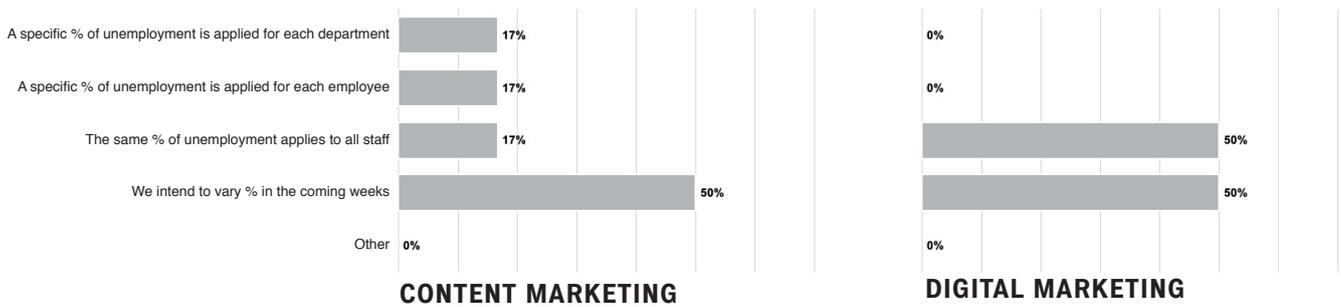
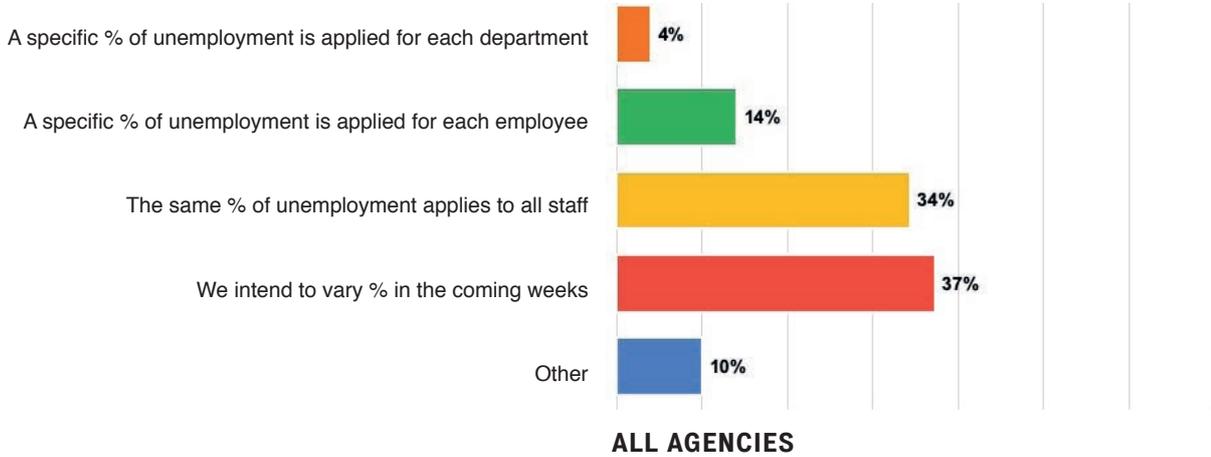
## REDUCED WORK VOLUME: MEASURES

In case of REDUCED current work volume, what measures did you take? (different options possible)



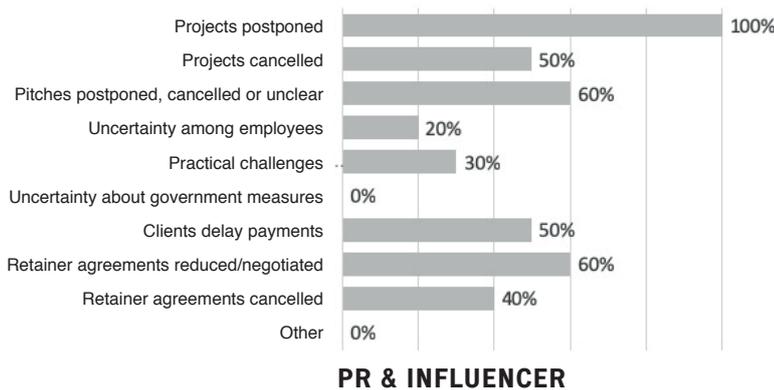
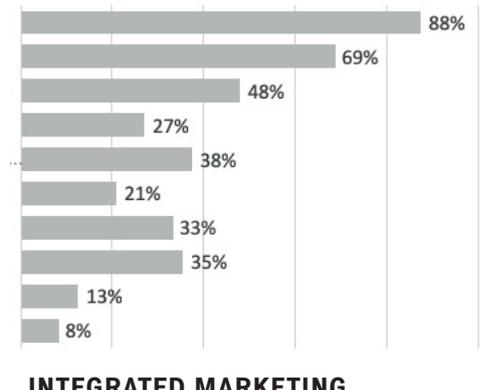
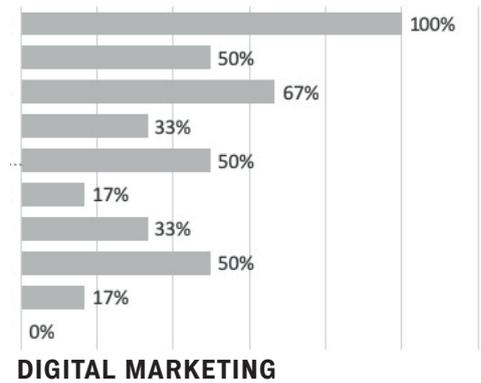
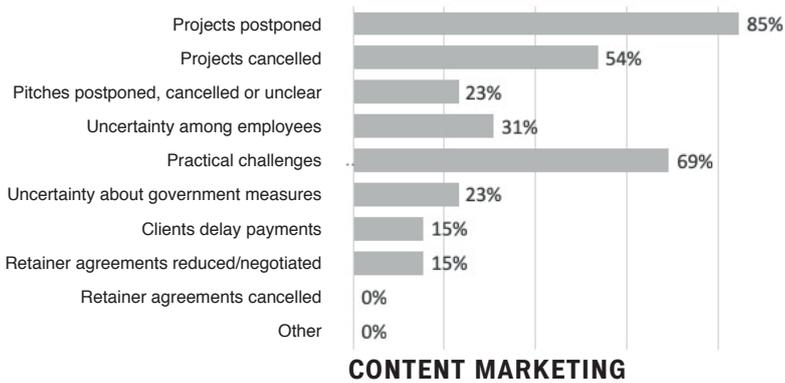
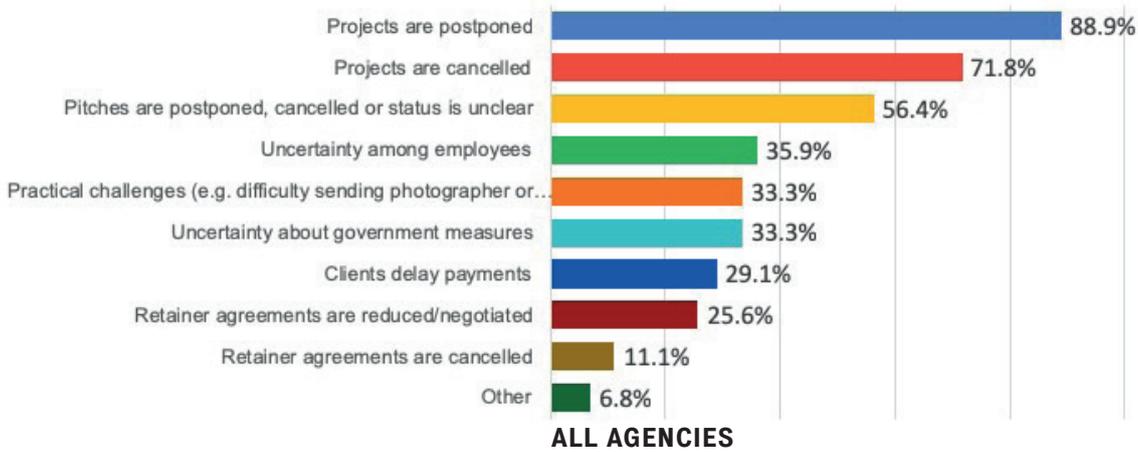
## TEMPORARY UNEMPLOYMENT: APPLICATION

In case of TEMPORARY UNEMPLOYMENT, how do you apply this across your company?



## CHALLENGES

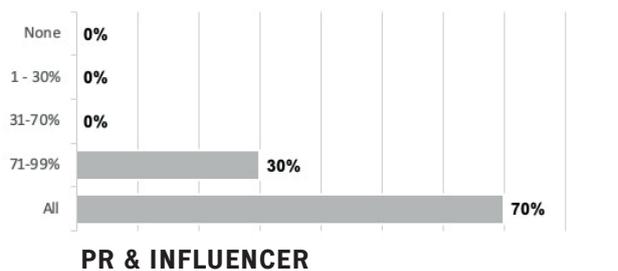
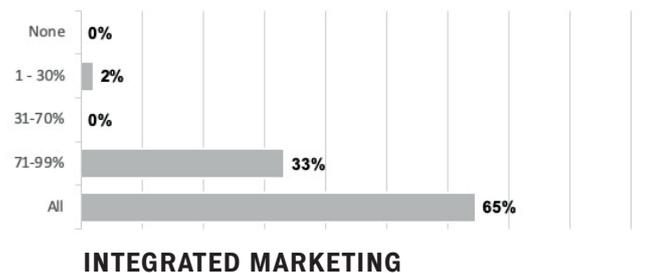
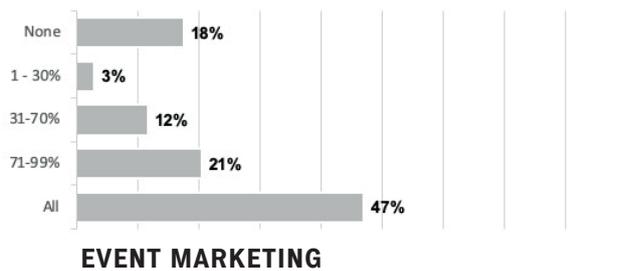
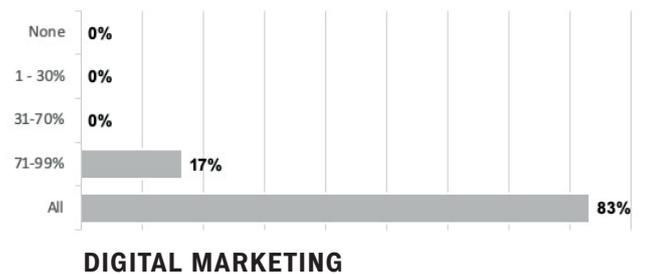
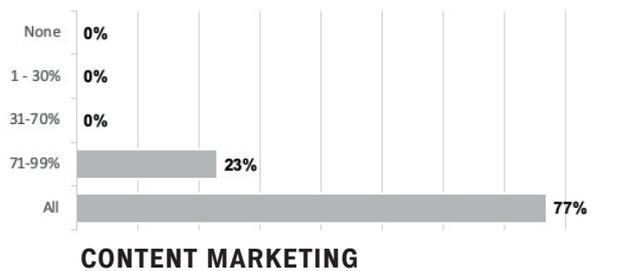
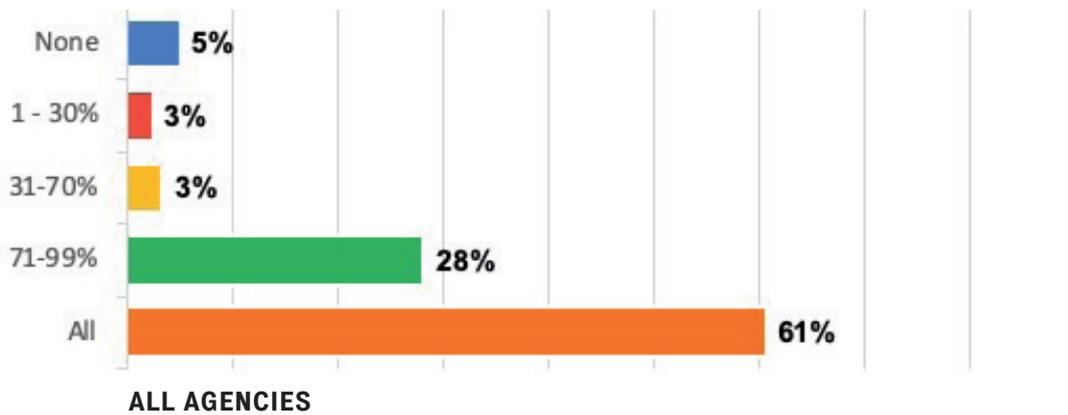
What are the BIGGEST CHALLENGES your Company faces due to corona? (please tick all options that apply)



# TELEWORKING ARRANGEMENTS

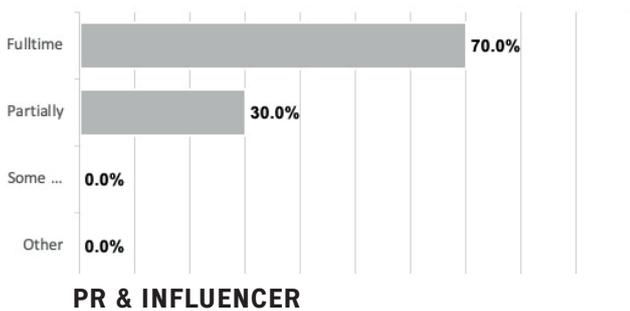
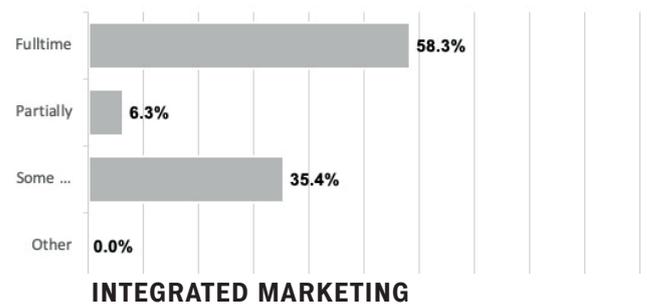
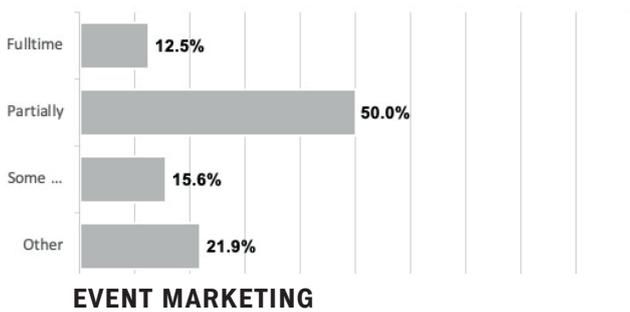
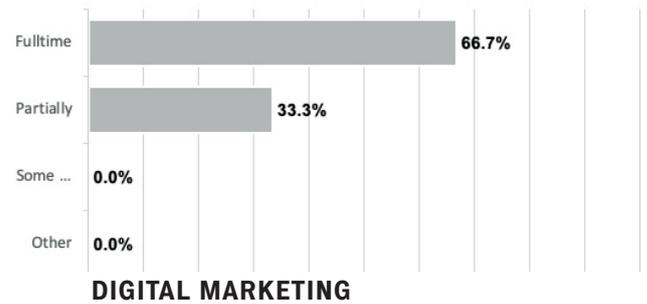
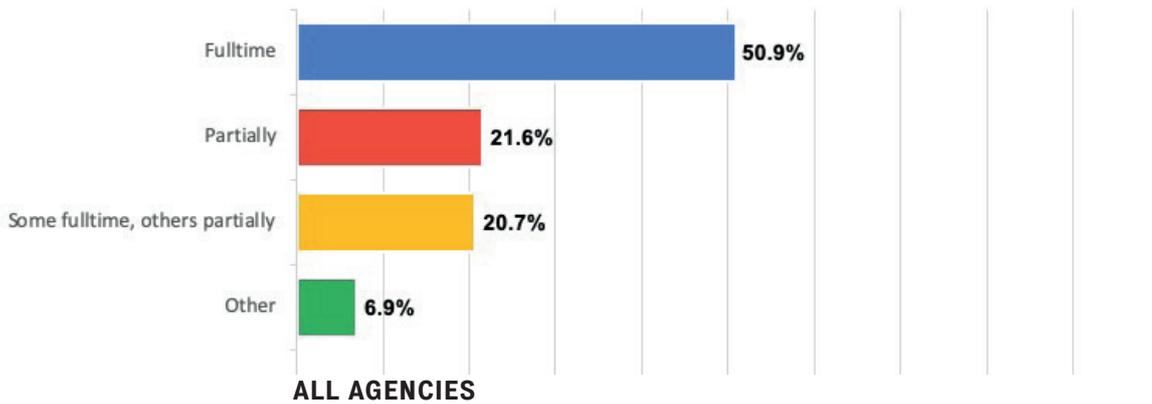
## EMPLOYEES WORKING AT HOME

What % of your staff are currently working from home?



## TIME WORKING AT HOME

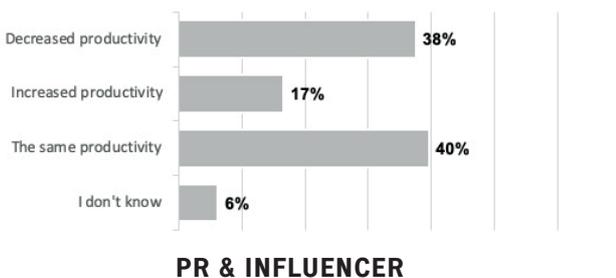
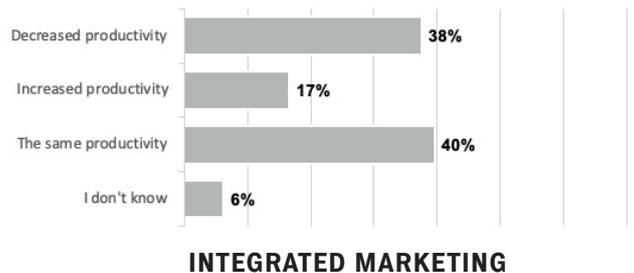
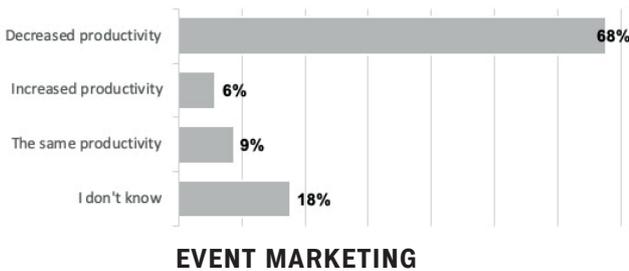
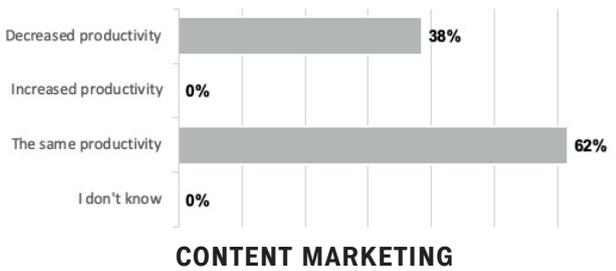
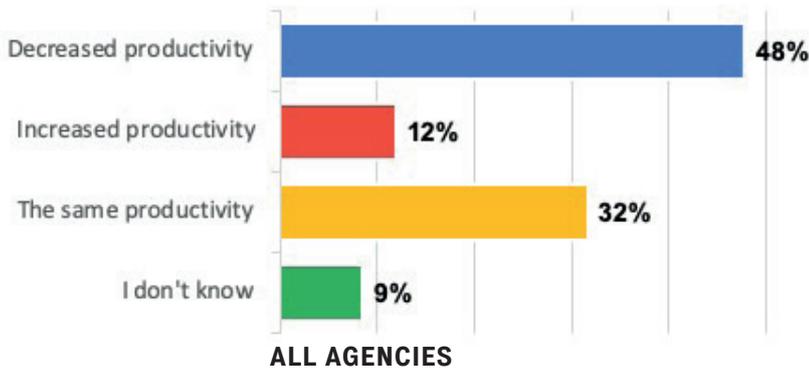
How much of their time are your staff members working at home?





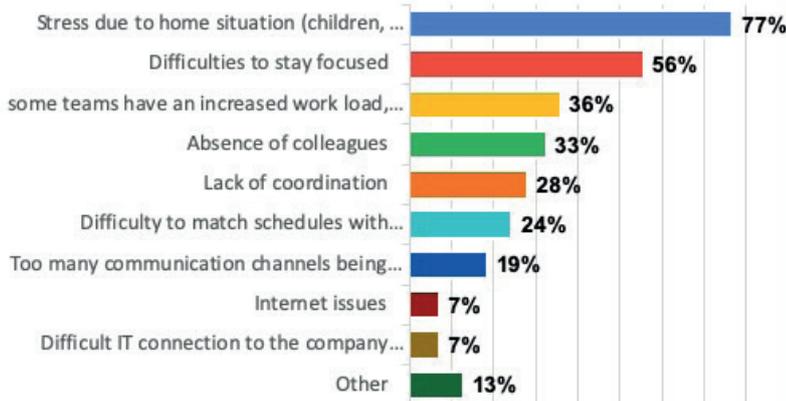
## PRODUCTIVITY WORKING AT HOME

How do you estimate home workers' change in productivity?

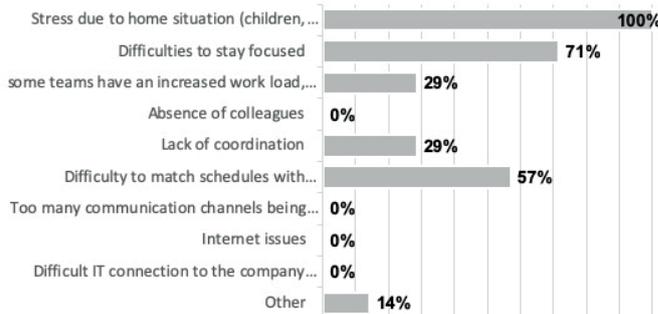


## DECREASED PRODUCTIVITY

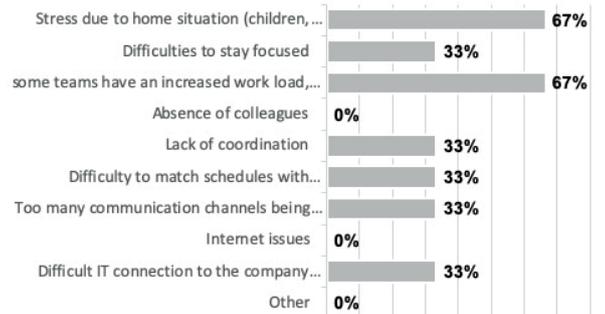
What are in your opinion the main reasons for a decreased productivity? (please tick all options that apply)



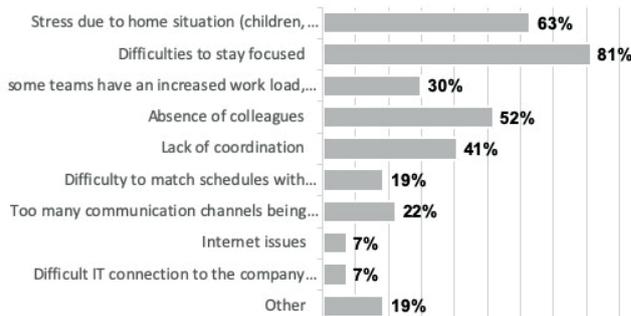
ALL AGENCIES



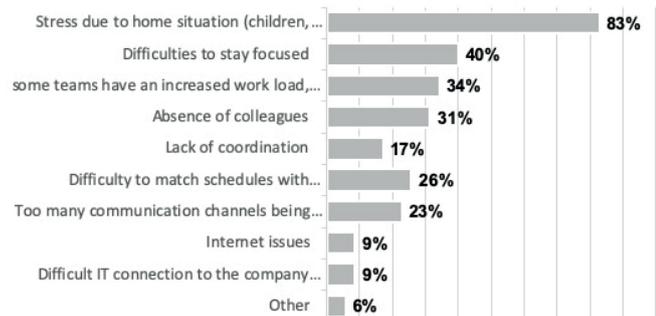
CONTENT MARKETING



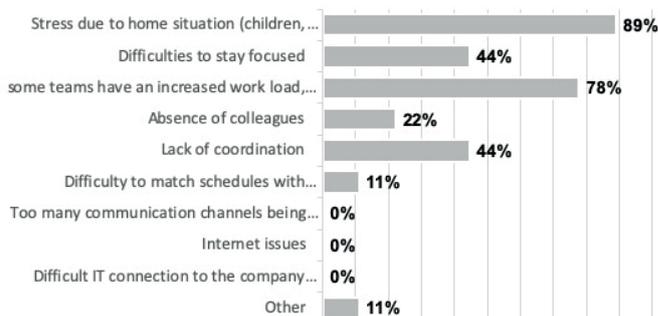
DIGITAL MARKETING



EVENT MARKETING



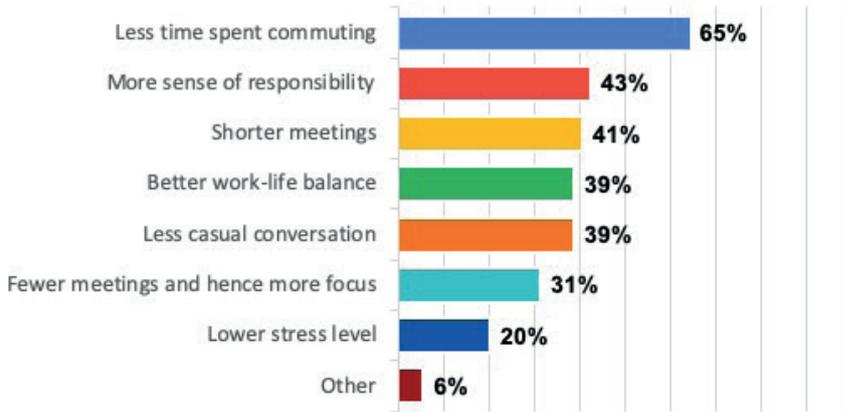
INTEGRATED MARKETING



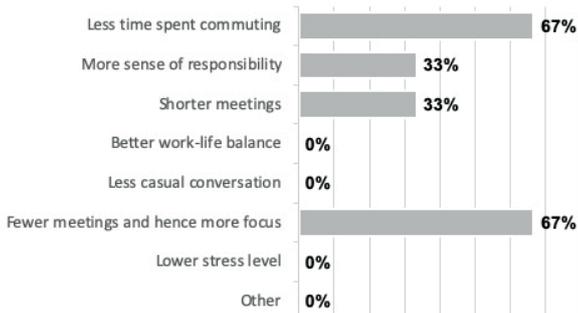
PR & INFLUENCER

## INCREASED PRODUCTIVITY

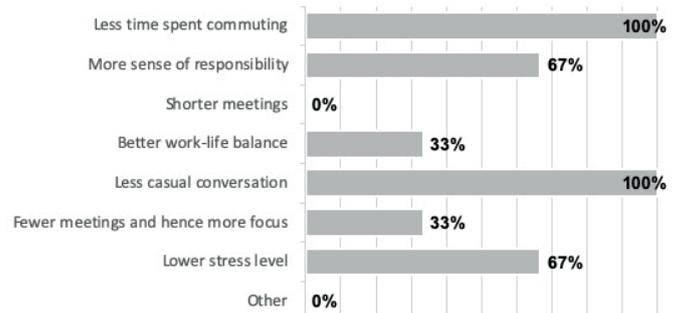
What are in your opinion the main reasons for an increased productivity? (please tick all options that apply)



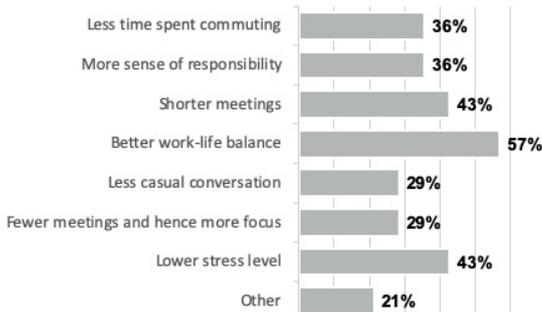
**ALL AGENCIES**



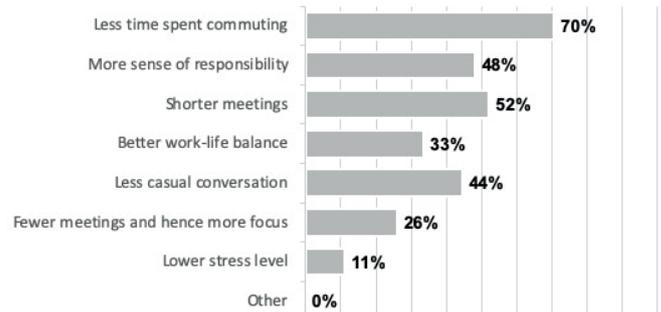
**CONTENT MARKETING**



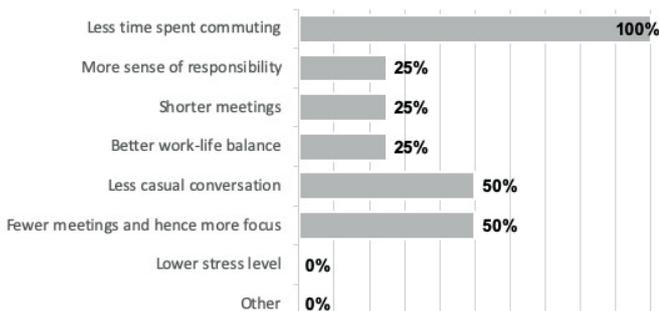
**DIGITAL MARKETING**



**EVENT MARKETING**



**INTEGRATED MARKETING**

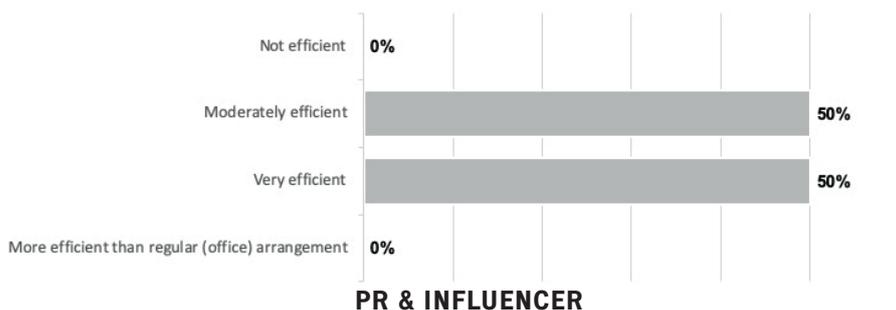
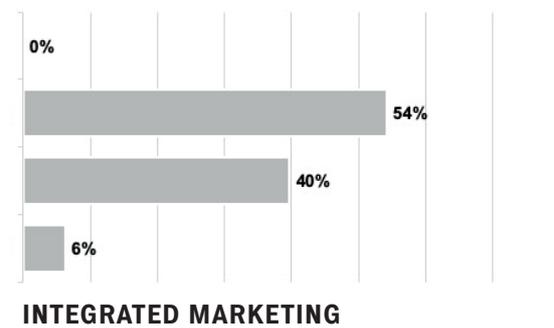
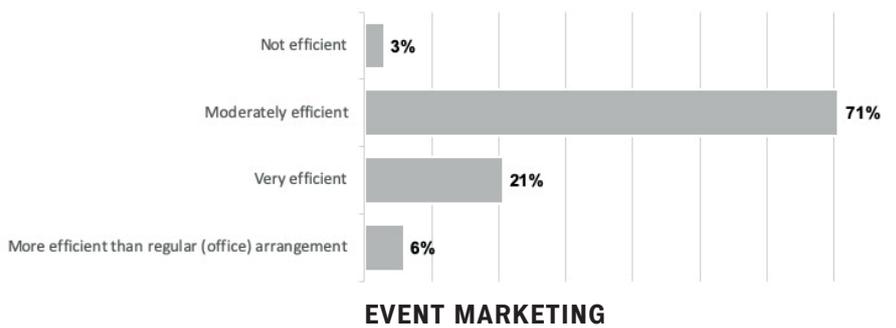
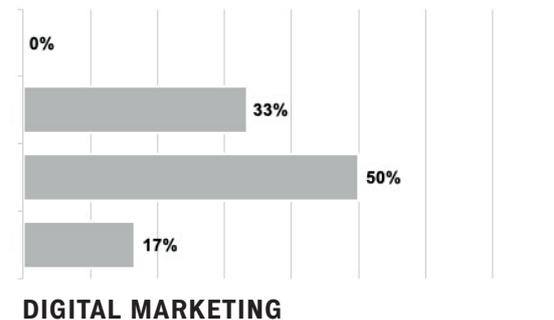
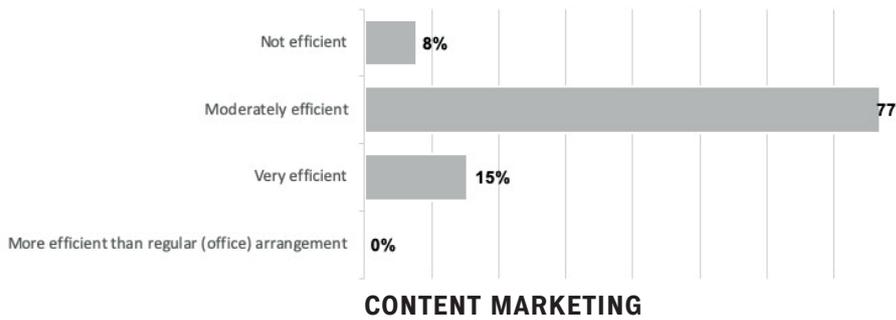
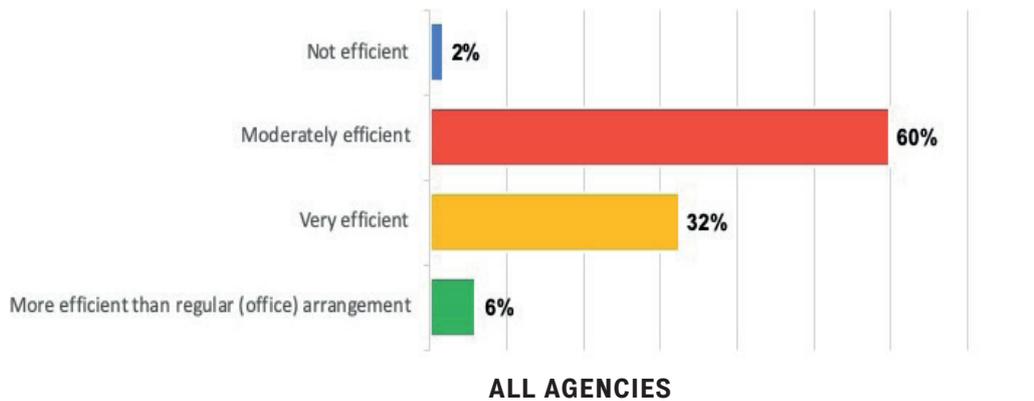


**PR & INFLUENCER**

# TOOLS FOR TELEWORKING

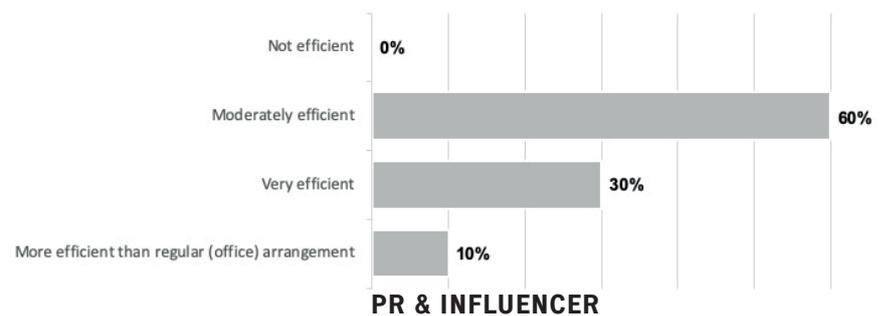
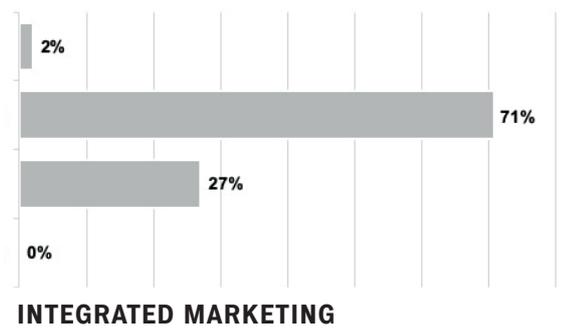
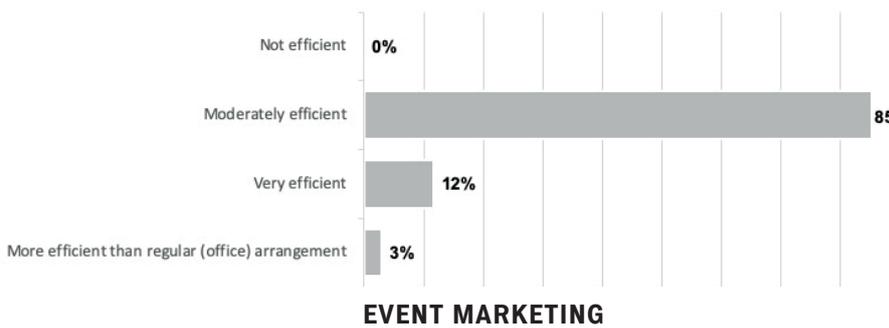
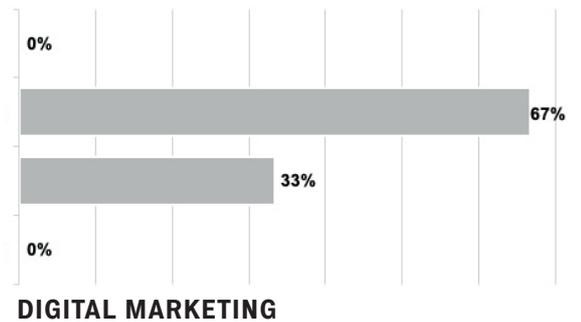
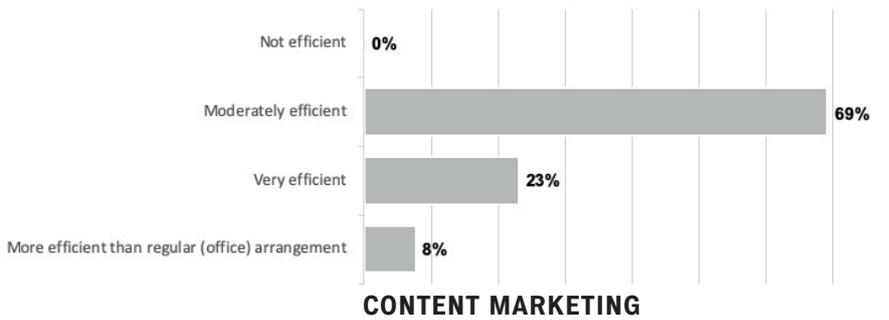
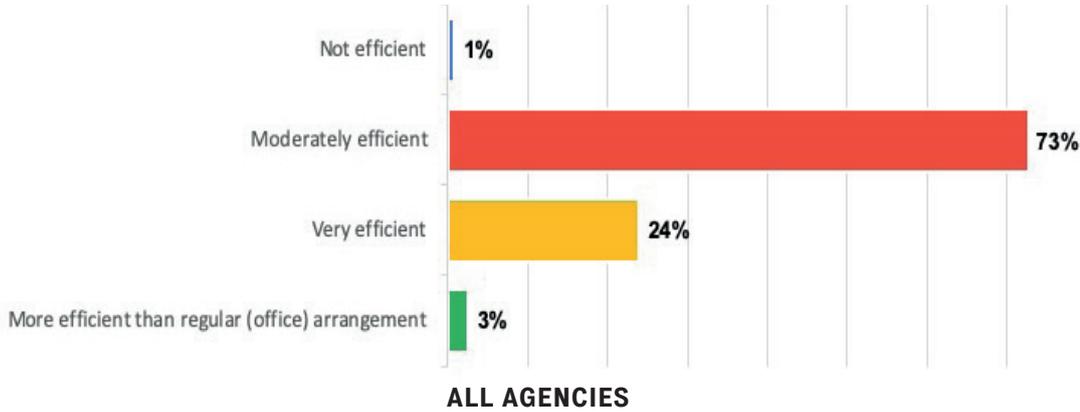
## EFFICIENCY REMOTE WORKING EMPLOYEES

How do you rate the efficiency of the remote working arrangements with employees?



## EFFICIENCY REMOTE WORKING CLIENTS

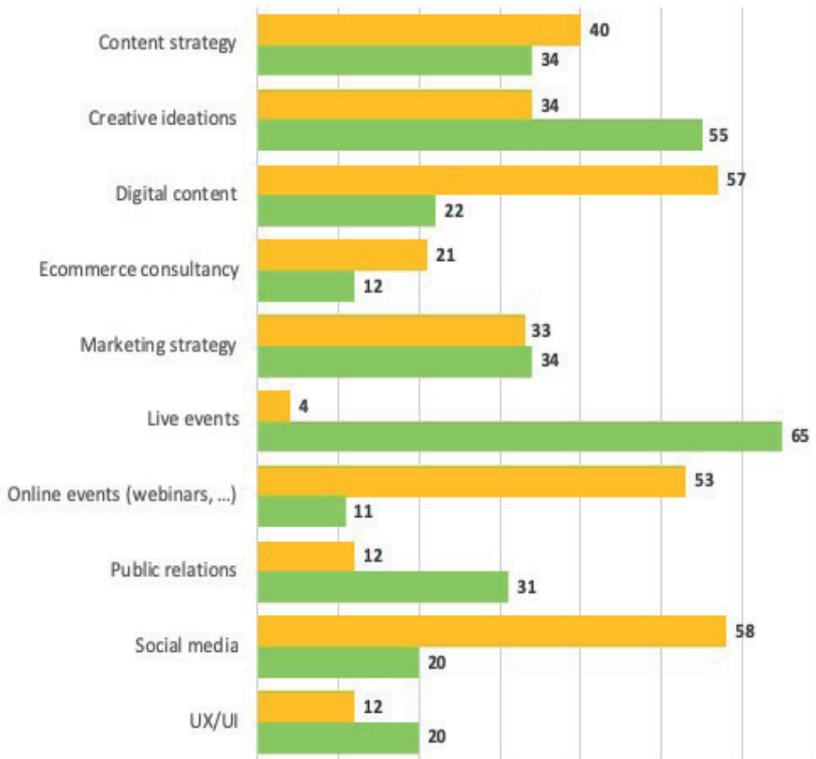
How do you rate the efficiency of the remote working arrangements with clients



# CLIENT ACTIVITY

## DECREASED & INCREASED DEMAND

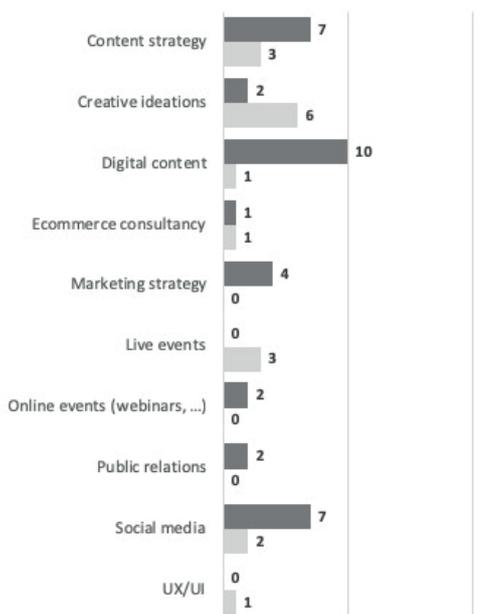
Compared to the pre-corona period, has there been an INCREASED or DECREASED DEMAND from your clients for specific services? (please tick all options that apply)



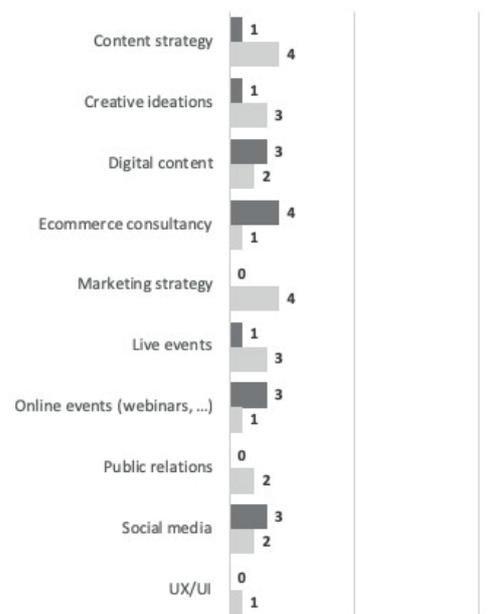
ALL AGENCIES



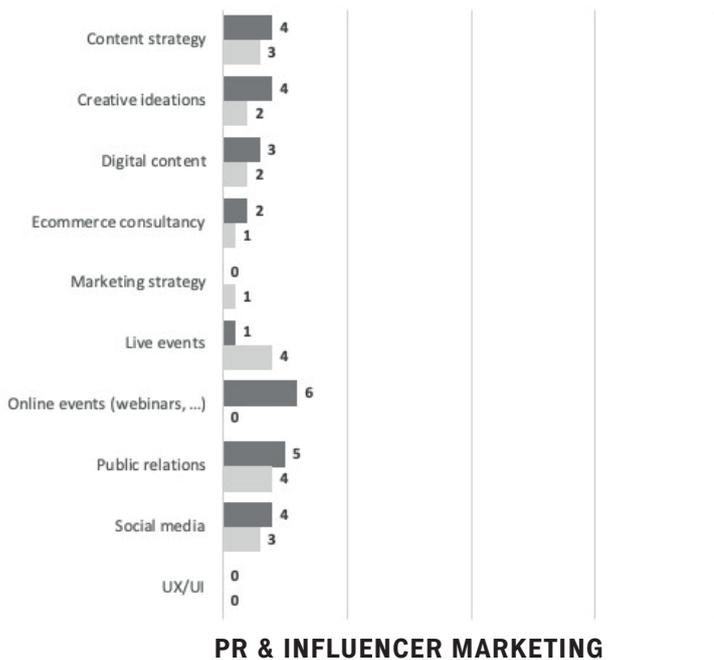
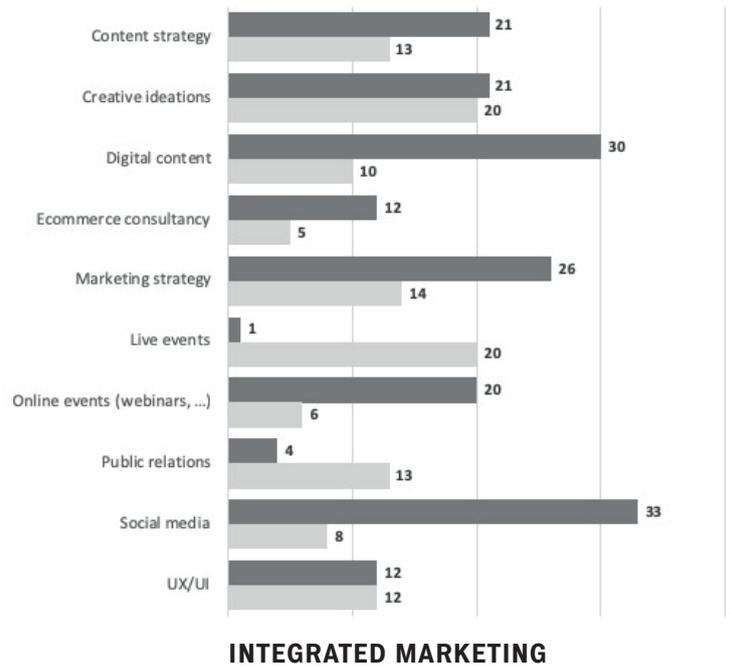
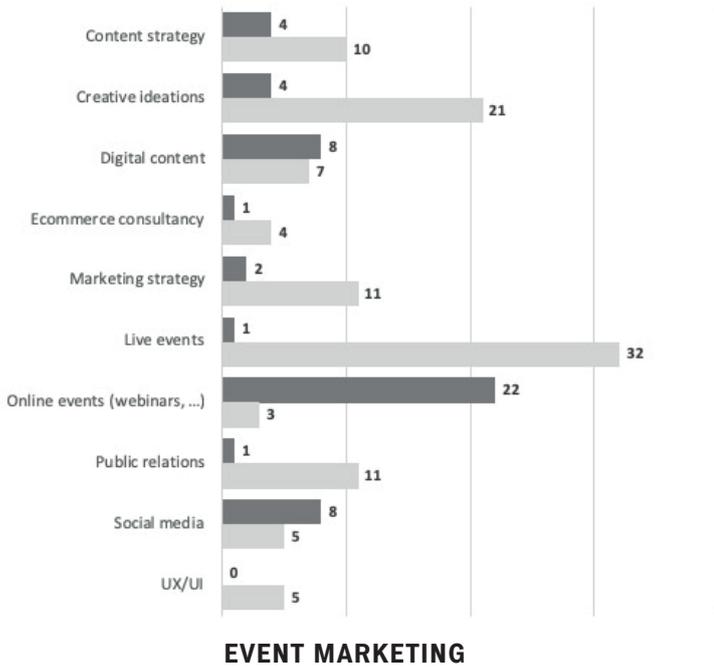
Figures are number of mentions



CONTENT MARKETING



DIGITAL MARKETING



INCREASE  
 DECREASE

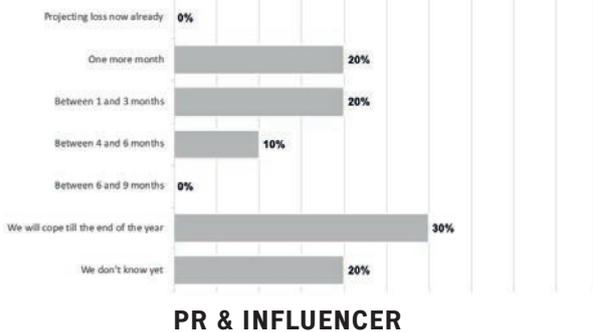
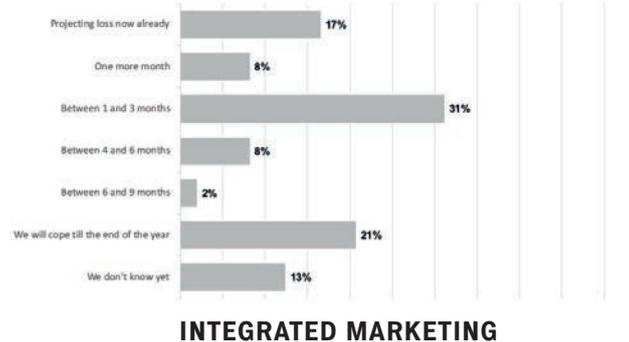
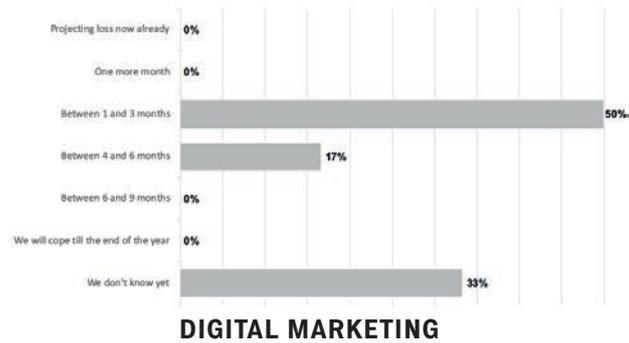
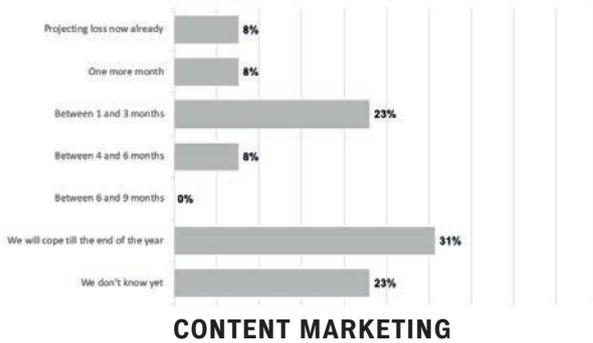
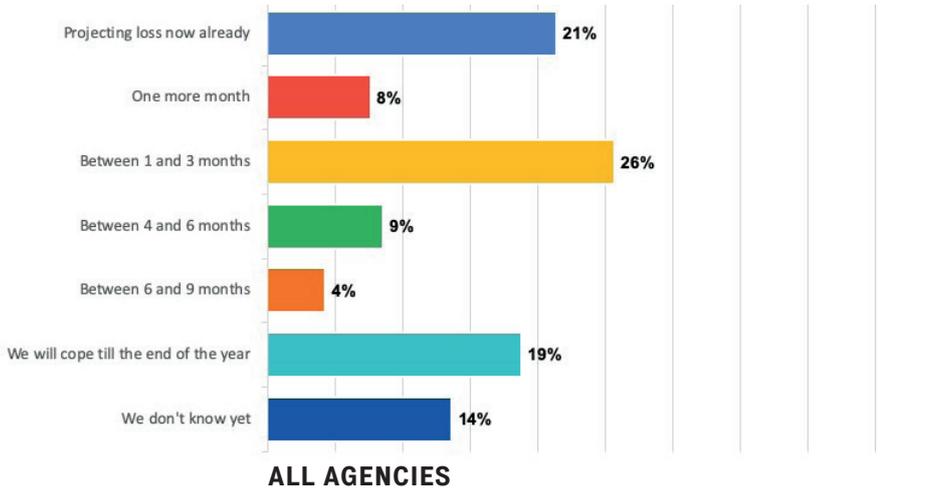
Figures are number of mentions

STAY  
at  
home

# OTHER QUESTIONS

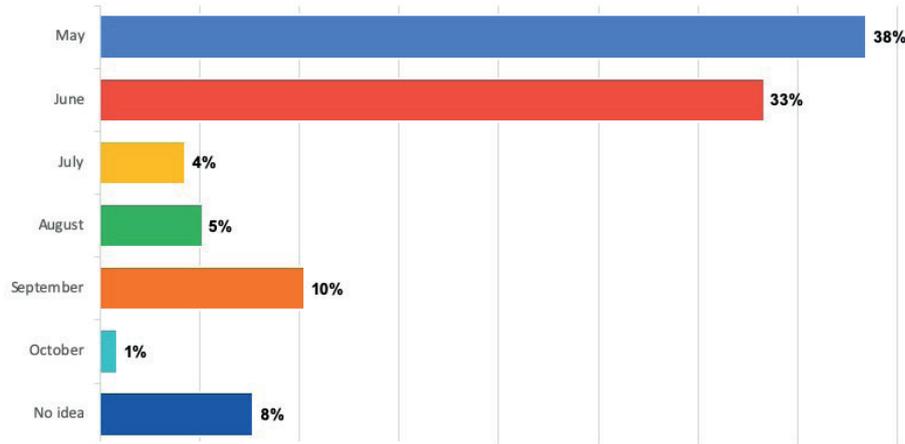
## YOUR FINANCIAL PERSPECTIVE

How much longer can you go on like this without making loss in your current fiscal year?

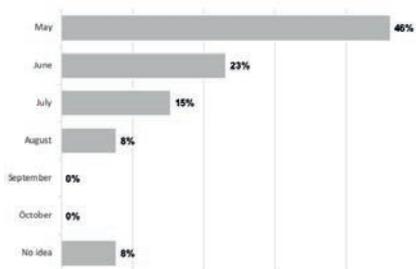


## RETURNING TO THE AGENCY

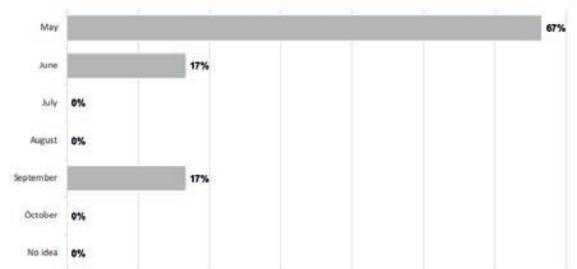
Which month do you think your staff will be allowed to come back to the agency?



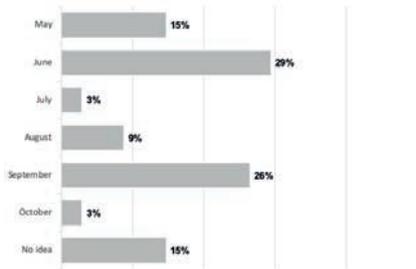
**ALL AGENCIES**



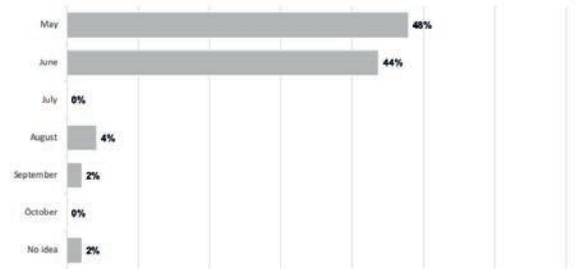
**CONTENT MARKETING**



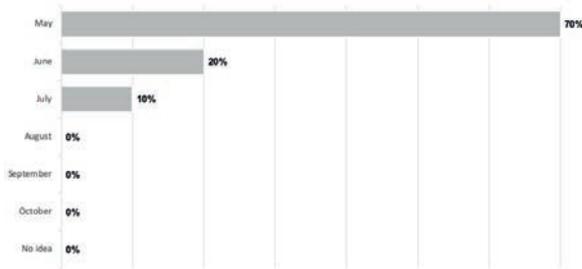
**DIGITAL MARKETING**



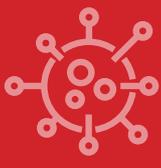
**EVENT MARKETING**



**INTEGRATED MARKETING**



**PR & INFLUENCER**



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