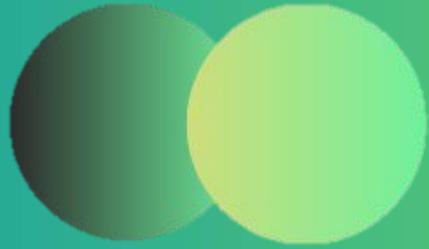
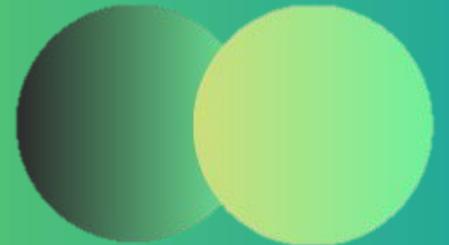


ESSA | Event Supplier and
Services Association



Stronger Together Survey Results

November 2025



Introduction

Our inaugural *Stronger Together* survey shines a light on the real issues facing our members right now, offering valuable insight into the state of our sector.

From a broad perspective, it's clear that operating costs continue to rise, forcing many businesses to increase prices, pause expansion plans or in some cases, reduce their workforce. While there are clear opportunities for growth, particularly through international projects, ongoing visa and documentation complexities remain a barrier for some.

It's encouraging to see that sustainability is becoming more embedded in operations, though challenges around time, cost and perceived value continue to slow progress. When it comes to representation, almost all members feel our industry is underrepresented at government level, particularly when it comes to the recognition of our economic contribution.

We are undoubtedly moving in the right direction, but challenges persist. Our mission at ESSA is to ensure you have the insights, tools and support needed to help navigate uncertainty, embrace opportunity and continue building a stronger, more sustainable future for our industry.

Andrew Harrison

CEO, Event Supplier and Services
Association



Snapshot

92%

said overall costs had increased between Jan 2024 – Jan 2025

71%

had to increase prices due to increased business costs

73%

said recruitment has been challenging in the last 12 months

87%

say the biggest challenge for retaining staff is work-life balance

49%

said a client's understanding of the logistical realities and costs of services was poor

32%

is the average revenue that comes from international events

66%

cited costs as the biggest challenge to implementing sustainability practices

32%

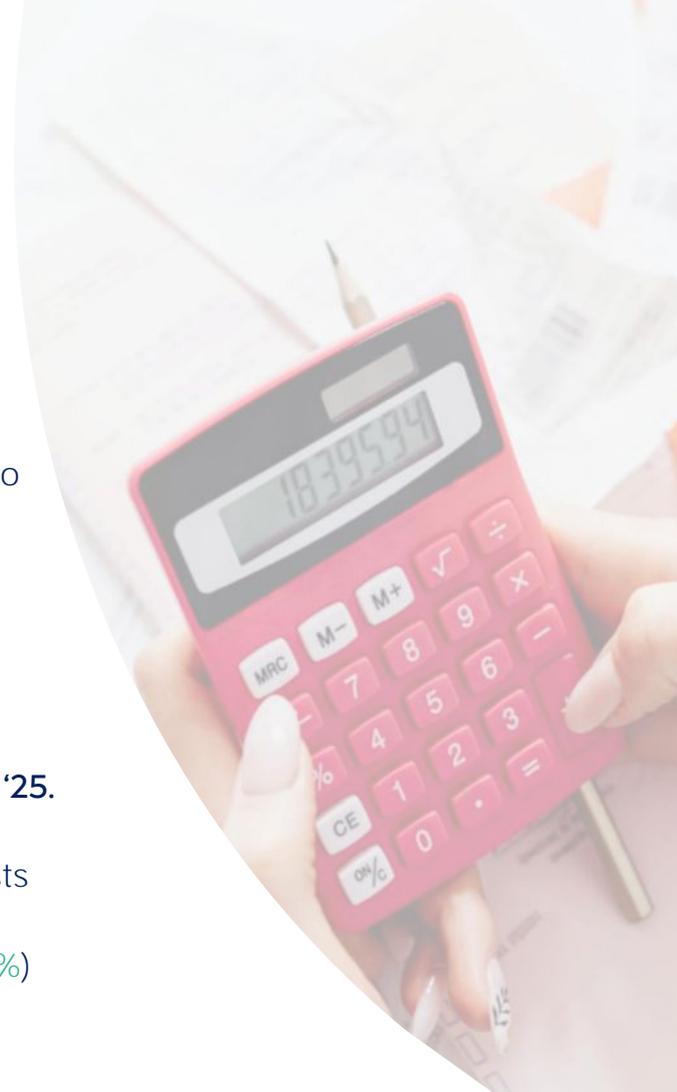
are yet to put a sustainability plan in place

98%

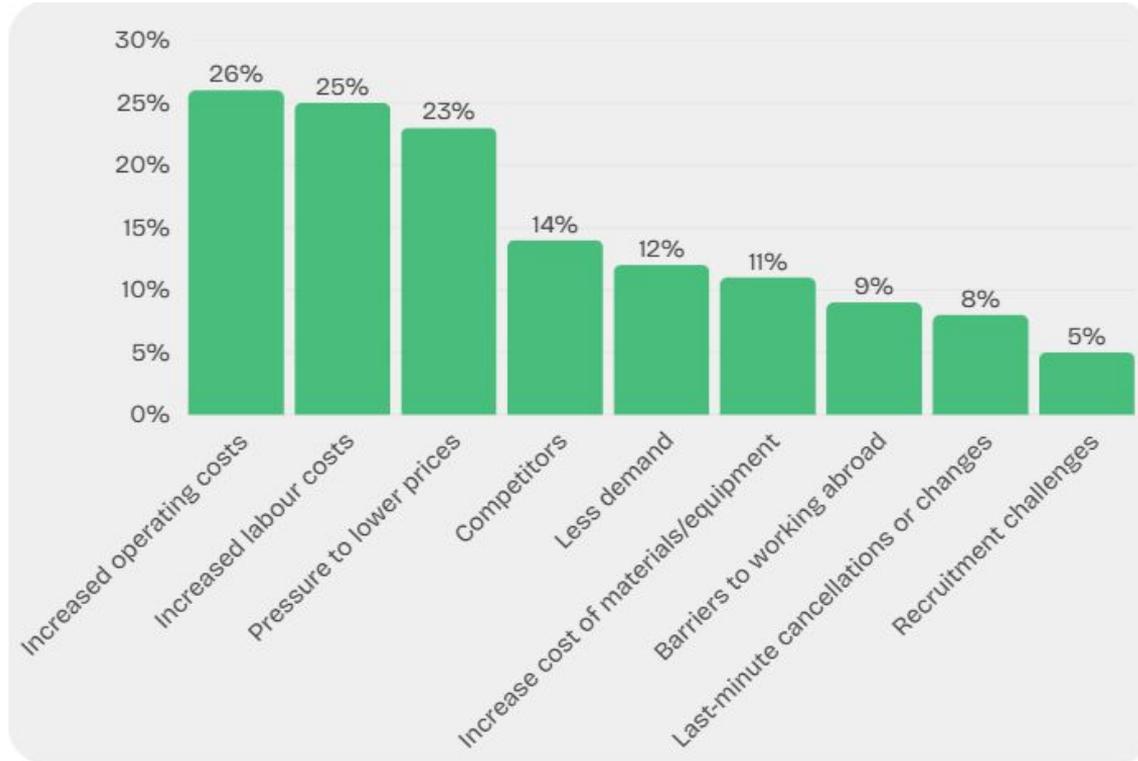
want government recognition of **the industry's economic value**

Business & Costs

- ❑ For almost half (46%), forecast revenue for 2025 was higher than for 2024. 29% said their 2025 forecast was less.
- ❑ Increases to operating costs (26%), labour costs (25%) and pressure to lower prices (23%) were cited as the main reasons for decreased forecast.
- ❑ A third (35%) said confirmed business was more in January 2025 compared to 2024. Only 31% said it was more in January 2024.
- ❑ **92% said overall operating costs had increased between Jan '24 – Jan '25.**
- ❑ 85% did not have to reduce their workforce because of increased costs
- ❑ However, 71% have had to increase prices, and more than a third (37%) had to put expansion plans on hold to combat cost increases.

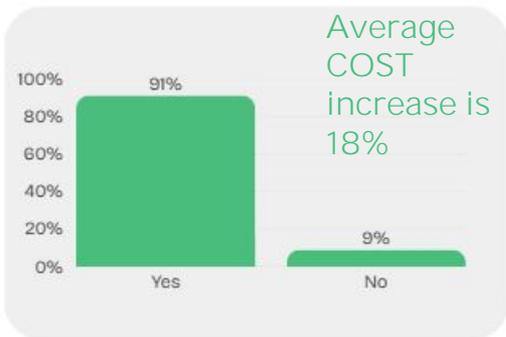


Top reasons for YOY revenue decreasing (2024 v 2025):
(respondents invited to select up to three):

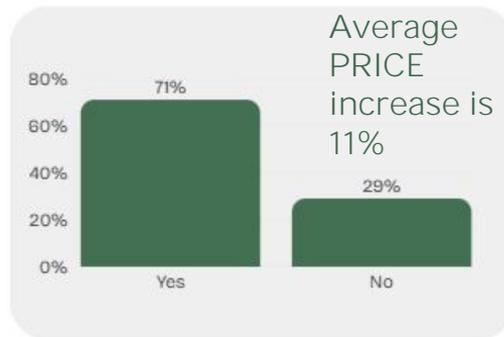


Costs: January 2024 v January 2025:

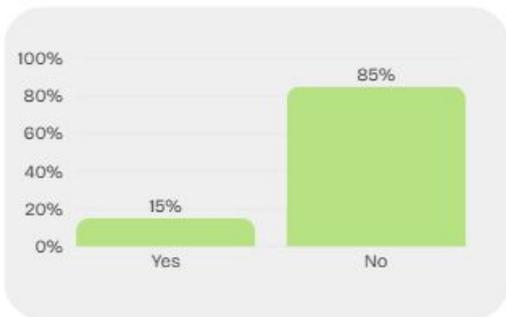
Have overall costs increased?



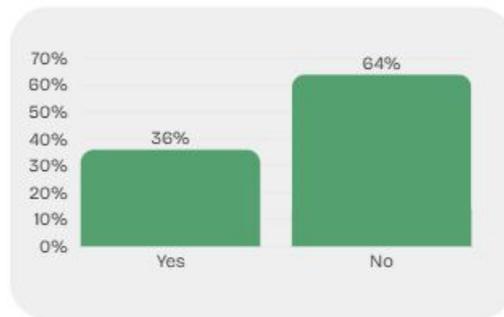
Have your prices increased to combat the increase?



Have you had to reduce your workforce to combat the increase?



Have expansion plans been put on hold to combat the increase?



Business & Costs

ESSA's view

“These results reflect a sector that remains resilient but continues to operate under sustained financial pressure. Rising operating and labour costs, alongside ongoing price pressures, are eroding margins and forcing many businesses to reassess their growth ambitions.

“Despite widespread cost escalation — reported by more than nine in ten — the majority have managed to protect jobs, vital in our labour-intensive sector. However, this stability has not come without compromise in other areas. As costs continue to rise unsustainably, over two-thirds have had to increase prices, and over a third have paused expansion plans to offset financial strain.

“The data reinforces the importance of continued government recognition of the events supply chain as a critical part of the UK economy. As an industry, we must continue to champion collaboration, efficiency and innovation to help our members because these cost pressures are not just stifling our industry but **also limits the wider events ecosystem and UK economy.”**

Andrew Harrison

CEO, Event Supplier and Services
Association



Business & Costs

Sector view

“2025 has brought mounting pressures on the cost of doing business, driven by government policies such as the rise in employers’ national insurance (around £40,000 on a £1m wage bill) and persistent market forces affecting labour costs as skills remain scarce and inflation stays above the 2% target. Energy prices remain high, while commercial rents have risen by nearly 80% over the past five years due to increased warehouse demand post-Brexit. Travel and logistics costs continue to climb — from hotels and fuel to fares and flights — while UK infrastructure struggles to keep pace and urgently needs investment.

“Despite these headwinds, demand for B2B events and live brand experiences remains strong. Exhibitors continue to value face-to-face engagement within environments focused on providing experiences and growth opportunities. It is this that gives the most hope and underpins why we continue to invest in our people and operations even amid a subdued economic outlook.”

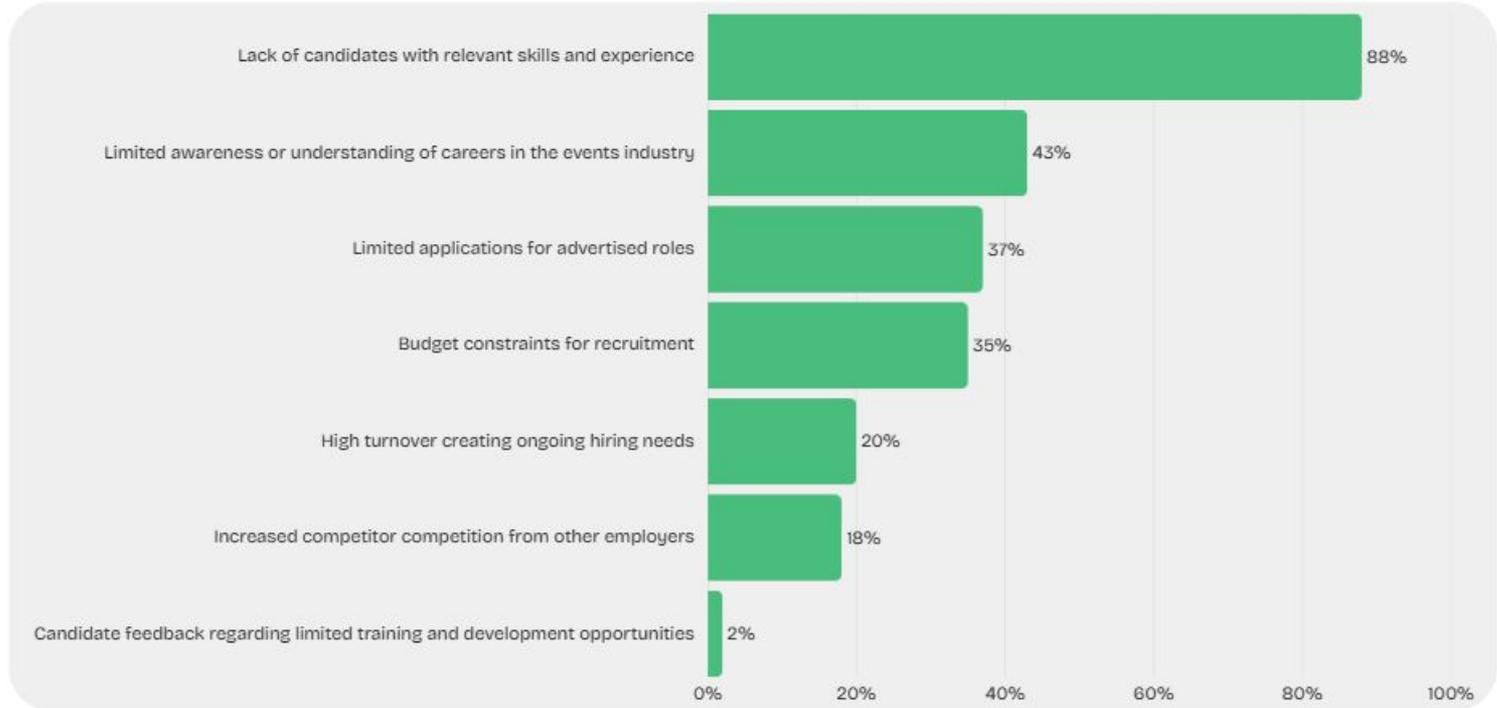


Rob Brackstone
Chair of ESSA and Managing Director, ESM

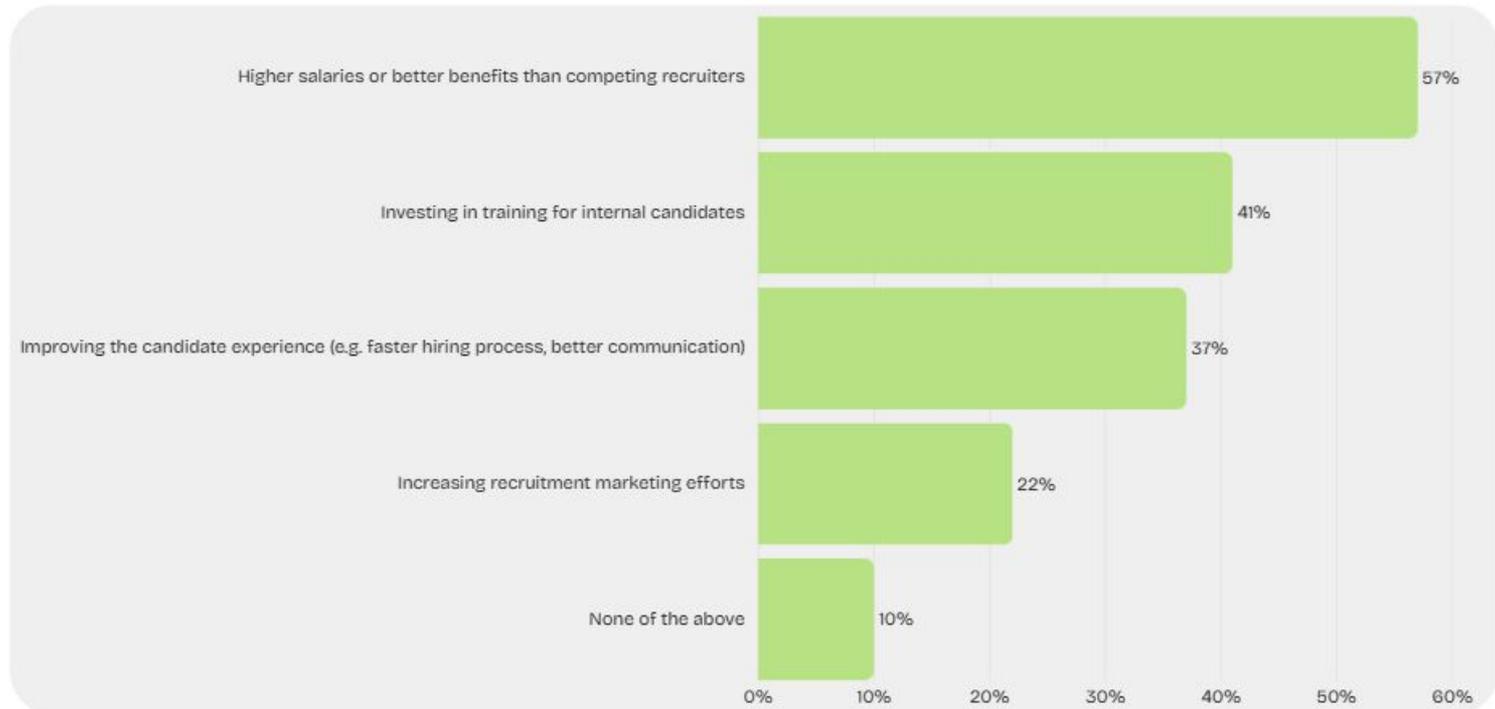
Recruitment

- ❑ Only two thirds (68%) of organisations are operating at the required staffing capacity. For over a quarter (27%), capacity has reduced in the last 12 months.
- ❑ Three quarters (73%) said recruitment has been challenging in the last 12 months.
- ❑ Almost 9 in 10 (88%) stated that the most significant challenge with recruitment is a lack of skilled candidates, followed by candidates with limited awareness or understanding of careers in the events industry (43%).
- ❑ 40% said it takes 3-4 months to fill a vacant role, with 17% stating it takes 4 months+.
- ❑ 57% said they are offering higher salaries or more benefits than competitors to encourage people to apply and to support the overall recruitment processes.
- ❑ 40% also said they are investing more in training for internal candidates.

The most significant challenges organisations face with recruitment: (respondents invited to select up to three):



Initiatives being implemented to support the recruitment process (respondents invited to select up to three):



Recruitment

ESSA's view

“One of the most persistent challenges facing our industry is the widening skills gap and ongoing struggle to attract and retain qualified talent. Only two-thirds of organisations are currently operating at full staffing capacity, and for over a quarter, this has declined in the past year. This is not a short-term hiring issue, but a challenge that threatens productivity, innovation and long-term growth.

“The overwhelming majority cite a lack of skilled candidates as the main barrier to recruitment, compounded by limited awareness of the diverse and rewarding career the events industry offers. The length of time it now takes to fill roles further underlines this.

“Encouragingly, many organisations are taking proactive steps by increasing salaries, benefits and investment in training and more need to follow suit. As an industry, we must continue to work together to elevate the profile of event careers and strengthen partnerships with education and training providers to ensure the next generation understands the value and opportunity our sector provides if we are to secure a sustainable future for the UK’s event supply chain.”

Andrew Harrison

CEO, Event Supplier and Services
Association

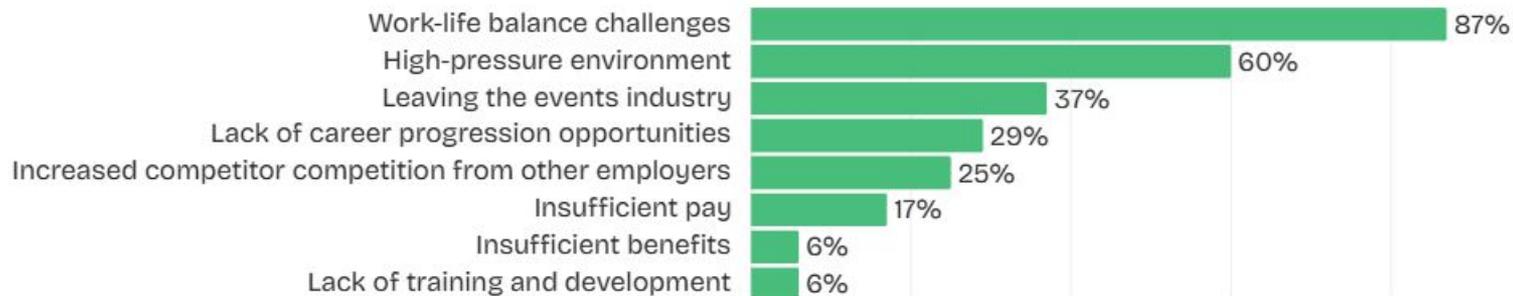


Retention

- ❑ 40% stay in their roles for 3-5 years, 28% for 6-10 years and a fifth (20%) for over 10 years demonstrating loyalty to employers and the sector.
- ❑ The biggest challenge for retaining staff is work-life balance, impacting almost 9 in 10 (87%). This is followed by high-pressure environment (60%) and leaving the events industry altogether (37%).
- ❑ 56% have improved work-life balance measures, over half (53%) are offering enhanced package and almost half (49%) have increased their focus on employee recognition.
- ❑ 57% agree they have a good work-life balance.
- ❑ The most popular wellness initiative offered is flexible or reduced hours during peak season, offered by 48%.
- ❑ Less than a third (29%) offer mental wellbeing support such as an Employee Assistance Programme (EAP). 29% do not offer any wellness initiatives.

The most significant challenges for retaining staff:

(respondents invited to select their top three):



Initiatives implemented in the last 12 month to support employee retention:

(respondents invited to select their top three):



Retention

ESSA's view

“Positively, a significant proportion of employees demonstrate long-term commitment, with the majority staying with their employers for more than three years, and many more for over a decade. This means there is a responsibility on employers to sustain engagement.

“**The demanding nature of events, coupled with the intensity of peak seasons is reflected by work-life balance emerging as the single greatest challenge to retention, impacting nearly nine in ten. To address this, over half of businesses have introduced enhanced packages, improved flexibility and greater recognition, but there remains a clear need for more structured wellbeing frameworks.**

“**Whilst flexible hours during peak periods are becoming a norm, there is still limited provision of formal mental health support, with fewer than one in three offering access to an Employee Assistance Programme. The industry's next step must be embedding wellbeing into business strategy.**”

Andrew Harrison

CEO, Event Supplier and Services
Association



Retention

Sector view

“Whilst the events industry is not unique in balancing staff retention against commercial and operational pressures, it does present some distinctive challenges. Many aspects of event work can be seen as both positives and negatives. Time away from family, for example, also offers opportunities to see new places and experiences, often travelling the globe **on the company’s behalf. Long or irregular hours, and clients who require flexibility,** are typically balanced by employers offering the same in return – time off in lieu, half days for personal commitments and a general understanding that life happens. The pressure of delivering to immovable deadlines is, equally, offset by the immense satisfaction of successfully delivering complex projects.

“**At Attend2IT, we treat our staff as adults. We trust them to manage their** time, shape their roles and communicate openly. This approach not only keeps the work fulfilling and compatible with personal lives but is also reflected in our strong staff retention rates.”



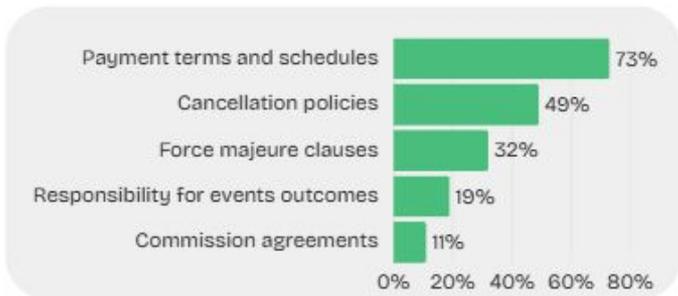
Dominic Hampton
Managing Director, Attend2IT

Contracts

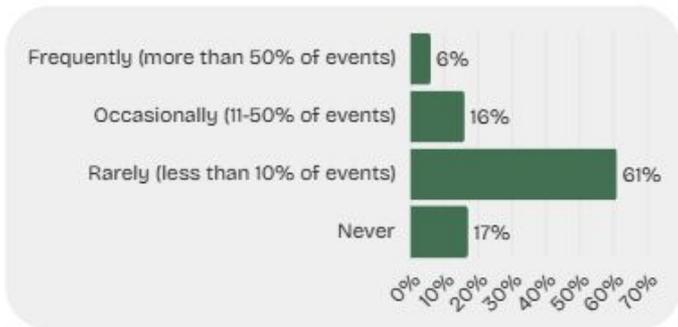
- ❑ Regarding clarity of contracts between businesses and the client, only 29% said clarity was 'very clear'.
- ❑ Regarding challenges around contracts, 73% said the biggest issue was around payment terms and schedules, followed by cancellation policies (49%) and force majeure clauses (33%).
- ❑ 44% said communication with clients had improved in the past year, 50% said it had stayed the same. Only (6%) said it had worsened.
- ❑ Conversely, almost half (49%) said that a client's understanding of the logistical realities and costs of services was poor. Only 4% said it was excellent.
- ❑ For two thirds, repeat business (67%) and word of mouth (22%) are the most common ways of doing so.



Aspects of contracts and agreements challenging to agree:
(respondents invited to select their top three):



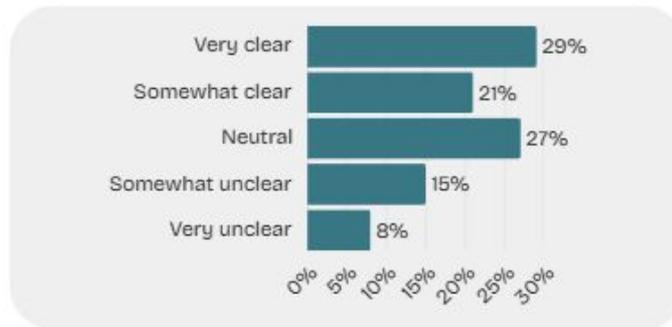
Frequency of contract renegotiation due to different preferences between parties:



Rating for clients' understanding of the logistical realities and costs of your services:



Clarity of contracts and agreements with clients:



Contracts

ESSA's view

“Clarity and consistency in contracting remain critical priorities for the sector

While most relationships remain stable, only a small proportion describe contracts as **‘very clear’** meaning that **too many businesses are still facing ambiguity around** key terms, particularly payment schedules, cancellation policies and force majeure clauses, which continues to create operational and financial challenges.

“Equally, there is a concerning persistent gap in the understanding of the true cost and complexity of delivering events. Almost half of respondents believe clients have a poor understanding of logistical realities, underlining the need for greater transparency, better education, collaboration and open dialogue between all parties.

“Encouragingly, strong repeat and referral business highlights that trust and reliability continue to be the foundation of successful partnerships, but greater contractual clarity will be key to strengthening resilience and mutual confidence.”

Andrew Harrison

CEO, Event Supplier and Services
Association



Contracts

Sector view

“Given that a contract is a two-way agreement, the concerning low level of confidence in their clarity could surely be improved with greater control in drafting the contract by the supplier?”

“**The spread of perception on challenges (payment terms, cancellation and force majeure),** seems to be a constant across the years. Payment terms will always be the primary one – cash is king, and the exhibition sector is driven by its need to be paid in a timely manner, given significant materials and labour spend.

“**The perception of client communication improving is good news.** That may well be a result of a wider dialogue on the associated subjects of sustainability, trust and brand-responsibility. But whatever the reason, it feels like its effort rewarded for ESSA members.

That trust feels underpinned by the reported metrics for the importance of repeat business. A similar continuing effort may be the way to improve **their understanding of logistics / cost.**”



Andrew Hickinbotham
Head of Sales, TECNA

Working Abroad

- ❑ Event businesses worked on an average of 16 projects that required them to work abroad.
- ❑ An average of nearly a third (32%) of revenue comes from international events.
- ❑ While documentation can be a barrier to working abroad, most surveyed rated it a 3 out of 5 in difficulty to source and complete.
- ❑ Of those countries worked in, Germany was the most common, with 46% completing a project there in the past 12 months. This was followed by Spain (36%), France (34%) and the Netherlands (20%).



Main overseas countries event suppliers have worked in during the past 12 months:



Working Abroad

ESSA's view

“**The importance of international markets to UK event suppliers remains clear, with nearly a third of revenue now derived from overseas projects, reaffirming the UK’s strong reputation for delivering world-class event services abroad.**

“**Though documentation and post-Brexit red tape remain barriers, most rate the process as moderately challenging rather than completely prohibitive, a sign that whilst businesses are adapting to the new requirements, more work is required to make this process quicker and easier.**

“**The results underline the global competitiveness of UK event suppliers and long-standing client relationships, They also show the continued need for government and industry collaboration to simplify the process and reduce administrative burdens to safeguard the UK’s status as a leading hub for international event delivery.**

“**For further information, visit [ESSA’s comprehensive working aboard resource](#) which includes a working abroad helpline and guidance requirements by country.”**

Andrew Harrison

CEO, Event Supplier and Services
Association

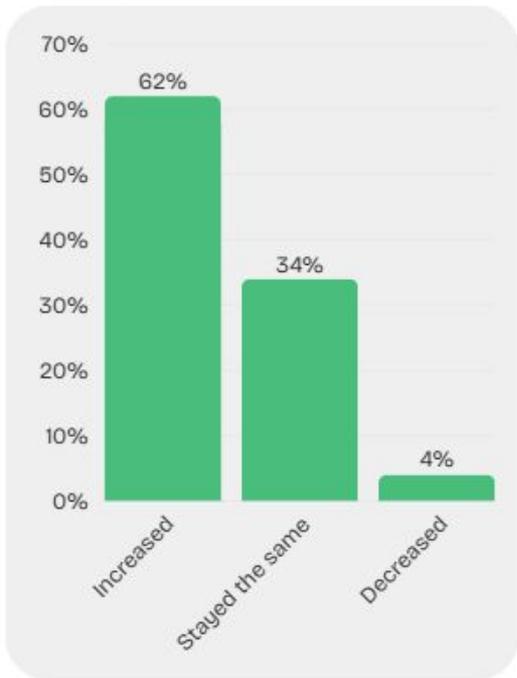


Sustainability

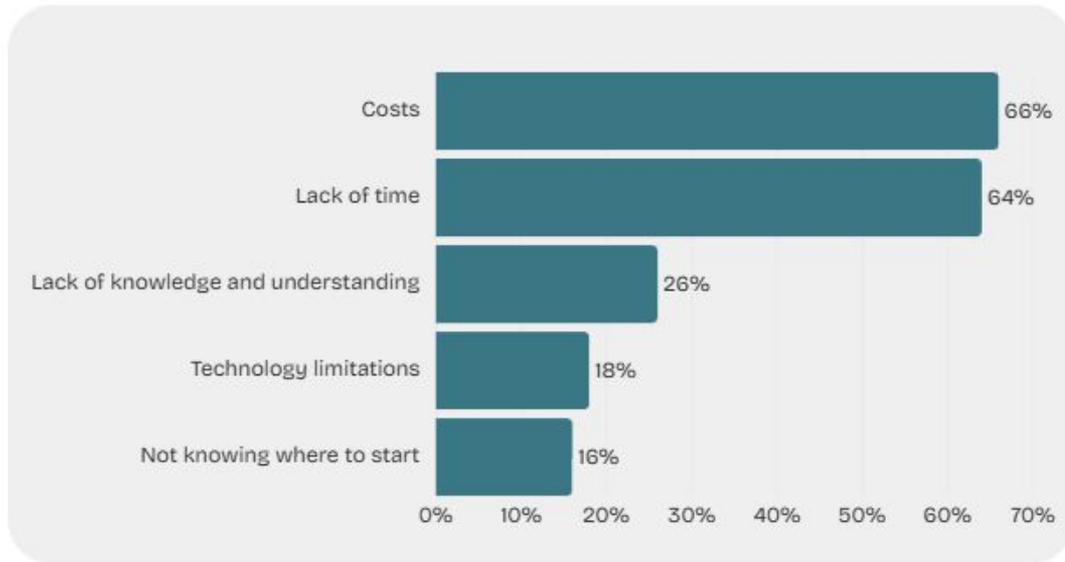
- ❑ 68% of event businesses surveyed said they had a sustainability plan in place, with almost a third (32%) yet to put one in place.
- ❑ The majority - 45% - review their plan on an annual basis, with 30% reviewing on an ad hoc basis. Only 8% review it monthly.
- ❑ 62% said that their business sustainability efforts increased in 2024 compared to 2023. 34% said their efforts remained the same.
- ❑ The top three challenges cited when it comes to implementing sustainability practices were costs for two-thirds (66%) of respondents, lack of time (64%) and lack of resources (46%).



Compared to 2023, did your businesses sustainability efforts change in 2024?



Main challenges with implementing sustainability practices (respondents invited to select their top three):



Sustainability

ESSA's view

“The findings demonstrate positive progress across the sector, with the majority now embedding sustainability planning into their operations. Encouragingly, most review their plans annually, reflecting a structured approach to responsible business practices. However, there remains a notable opportunity for consistency and greater accountability, as almost one in three still operate without a formal plan.

“The data reinforces what we often hear from our members — that ambition is high, but resources are stretched. Cost, time and capacity remain the primary barriers to advancing sustainability.

“To help turn intent into measurable, long-term impact, ESSA members can undertake our [ESSA Sustainability Accreditation](#). Free to full members, this evidence-focused, points-based annual accreditation provides a sustainability framework to help identify where green practices can be improved, implemented and measured, helping save your business money long term.”

Andrew Harrison

CEO, Event Supplier and Services
Association



Sustainability

Sector view

“Working with ESSA to achieve our Sustainability Accreditation has significantly helped drive our business forward by establishing clear sustainable objectives.

“**We actively engage with external stakeholders to understand their needs and expectations, ensuring our efforts are aligned with what is truly valued.**

“**While it's positive that many businesses surveyed have a sustainability plan, it's important to consider whether these plans were developed primarily to meet stakeholder needs or if there is a genuine will to implement change from within.**

“**Implementing change doesn't always require significant cost; often, savings are generated as a byproduct of these initiatives. Sustainability should be an integral part of every business, making it a fundamental aspect of how we operate.**”



Steve Colesell

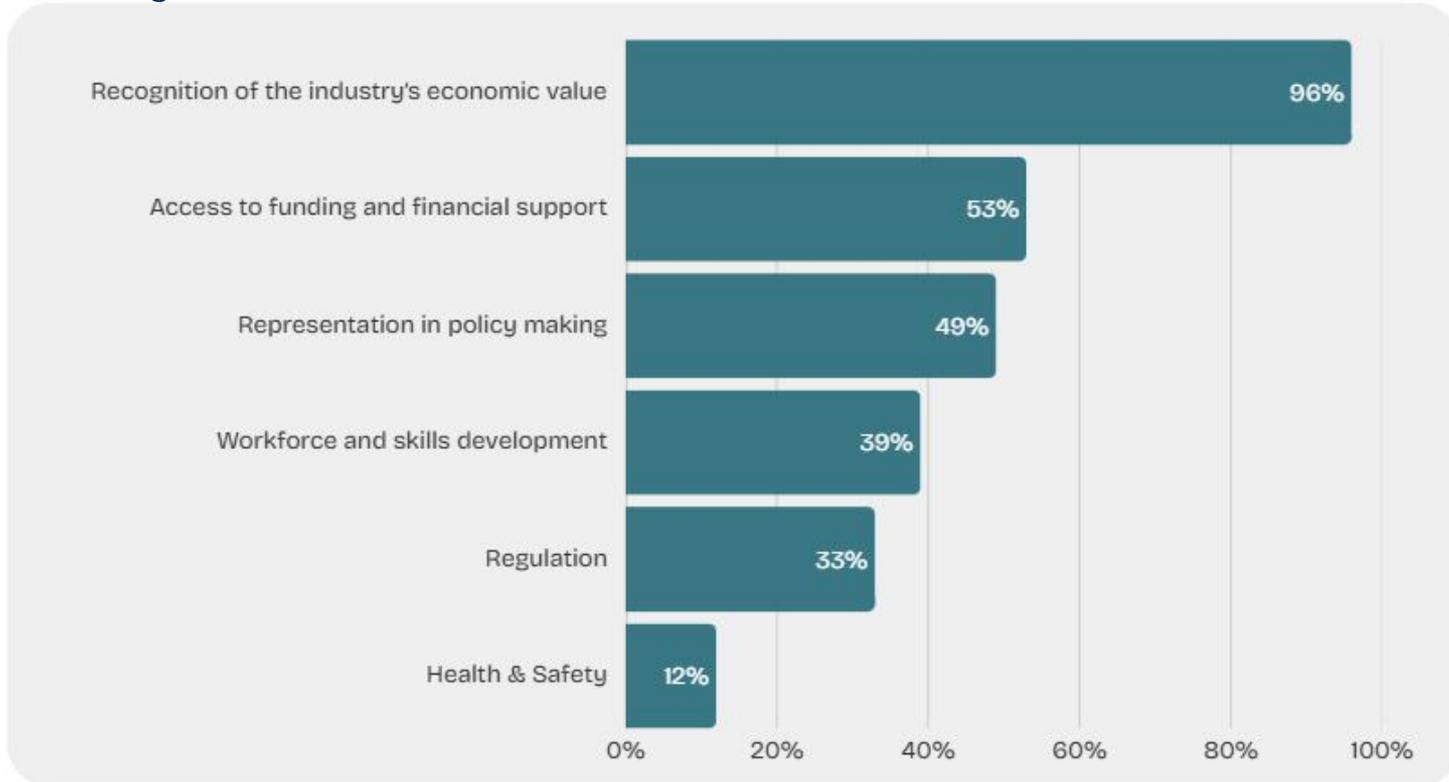
Operations Director, Aztec Event Services

Representation

- ❑ Respondents had an average score of **2 out of 5** when asked how well-represented they felt the events industry was at the government level (*1 being extremely underrepresented, 5 being extremely well represented*).
- ❑ The top three areas that those surveyed would like to see be better represented at government level were:
 1. **Recognition of the industry's economic value: 98%**
 2. Funding and financial support: **53%**
 3. Representation in policy making: **49%**



Key issues the events industry would like to be better represented for at government level (respondents invited to select their top three):



Representation

ESSA's view

“The results reinforce a long-standing frustration within the events sector: a lack of consistent recognition and representation at government level. With an average **score of just 2 out of 5 for perceived representation, it's clear that many feel the industry's economic and social contributions continue to be undervalued in policymaking and funding discussions.**

“**Almost all** respondents (98%) highlighted the need for greater government **recognition of the industry's economic value, after all, we are a sector that** generates billions for the UK economy, supports thousands of SMEs and sustains a skilled workforce.

“**ESSA and the EIA will continue to lead on this because it is essential for our industry's future, but lasting change requires a united effort. Every member has a** role to play in making our voice louder and harder to ignore, and by doing so, together, we can secure the recognition our industry deserves and position the UK at the forefront of global business events.”

Andrew Harrison

CEO, Event Supplier and Services
Association



Representation

Sector view

“Behind every event is an “invisible team” of talented individuals who work tirelessly to deliver flawless client experiences. Despite this, our sector continues to be overlooked by successive governments.

“This lack of visibility is felt in everyday life too. For example, when selecting a profession from a drop-down menu, the events simply sector doesn't exist. For an industry that employs over 126,000 people and generated £11.5bn in 2024, this systemic invisibility is unacceptable.

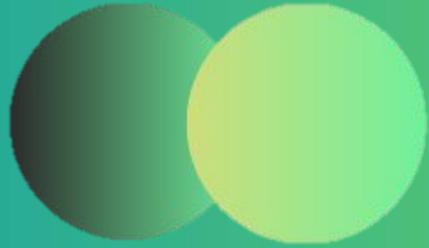
“Industry bodies such as ESSA, AEO, AEV and EIA work hard to raise our profile yet our voice still struggles to translate into meaningful government action. The pandemic exposed the fragility of this relationship. While some businesses accessed CBILS support, many are only now clearing the debt. Freelancers, who form the backbone of the industry, were left without **support and many never returned, deepening today's recruitment crisis.**

“Our sector has shown remarkable resilience, but meaningful dialogue is urgently needed to address the long-term, post-COVID challenges we continue to face.”



Lisa Tyson
Deputy Managing Director, Aztec Event Services

ESSA | Event Supplier and
Services Association



Contact Information

To learn more about ESSA – **the UK's leading association for contractors and suppliers in the business meetings and events industry, please get in touch. We'd love to hear from you.**

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