

## Autumn Pulse Survey – a challenging marketplace but increased positivity

ITI's latest Pulse Survey has revealed increased positivity about the business environment among members despite no improvement in market conditions, and a significant amount of adaptation to deal with the impact of COVID-19 on businesses.

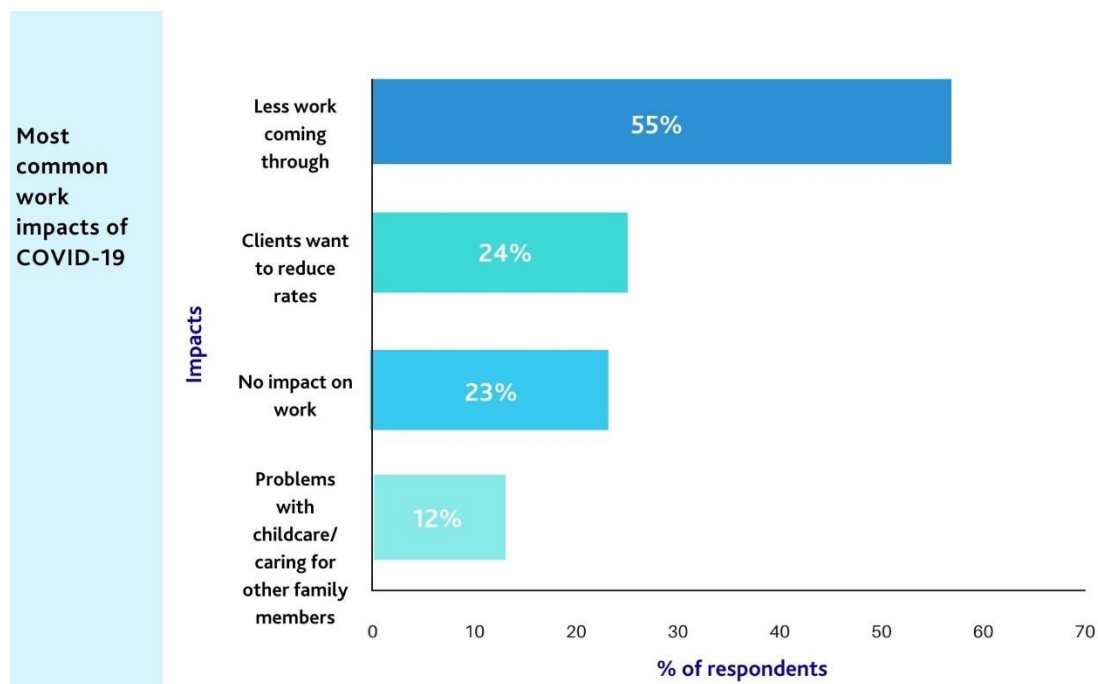
39% of respondents said they felt positive about their work and prospects in the current environment (versus 28% in the spring).

58% of respondents said they had gained new business over the last 12 months (versus 62% in the spring). 54% said work from existing clients had decreased (versus 44%).

Most members (61%) said they had managed to maintain their rates at a similar level, with 25% seeing a reduction and 13% an improvement.

50% of respondents said the impact of COVID-19 on their business lives had remained much the same since the April survey, while the remainder were evenly split between increased and decreased impact.

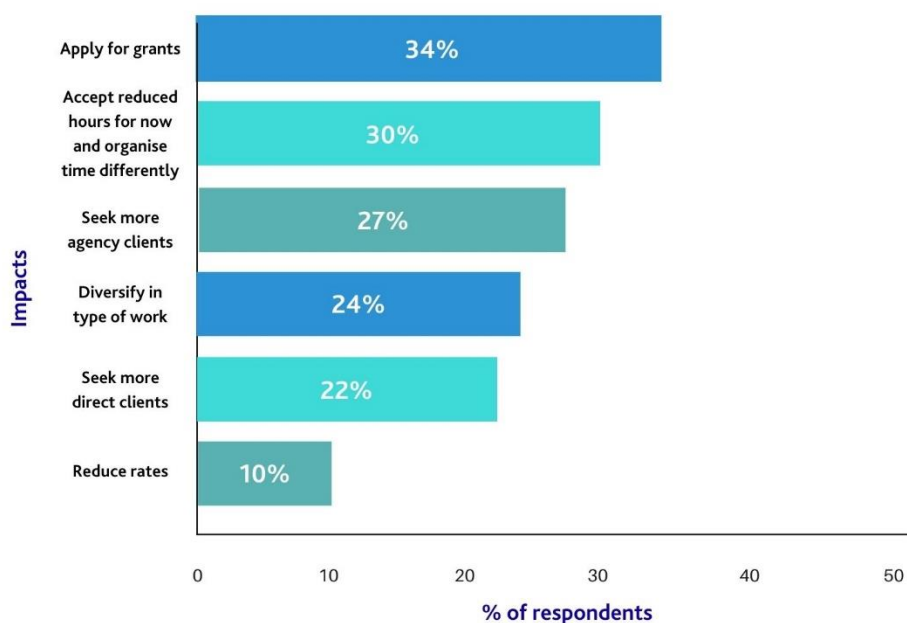
The most commonly referenced impacts were as follows:



7% of respondents said they had seen an increase in work over this period.

The most common adaptations cited by members to deal with the impact of COVID-19 on their working lives were as follows:

**Member actions to mitigate impacts of COVID**



We know that interpreters have faced specific challenges in relation to COVID, because of the widespread cancellation of face-to-face assignments, and this was reflected in the findings of our previous spring survey. Revisiting the issue in this survey, we see that the dedicated interpreter group in particular had been having a more difficult time than other respondents in terms of getting work and maintaining their normal rates.

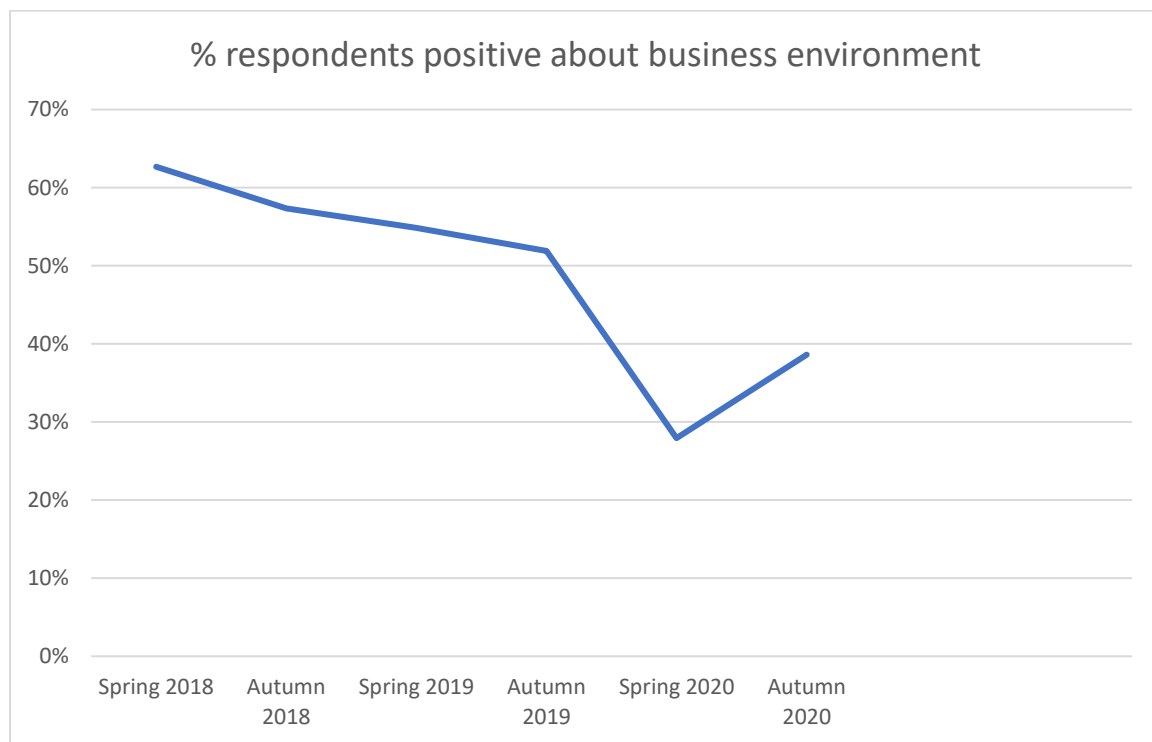
75% of dedicated interpreters said they had faced cancellation of face-to-face assignments, and 58% said they had experienced an increase in online assignments (reducing to 66% and 52% respectively for those doing both translation and interpreting). 46% had reorganised their office/purchased technology to facilitate remote interpreting (falling to 29% for those working in both disciplines).

**Comparison of market experiences: translators, translator/interpreters and interpreters**

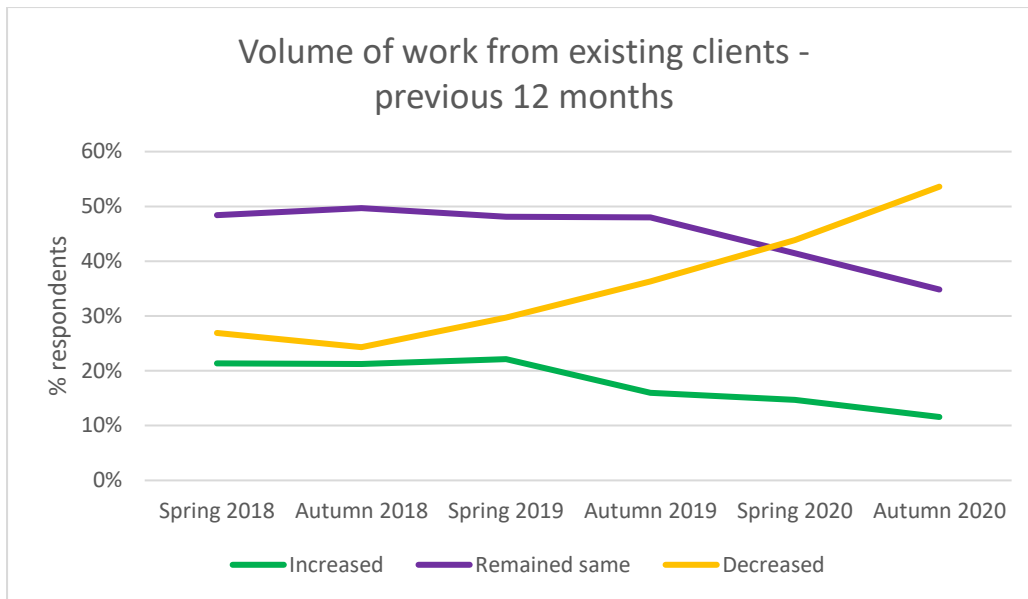
	Translators	Individuals who are both translators and interpreters	Interpreters
Less work coming through	55%	50%	71%
Gained new business	58%	66%	44%
Amount of work from existing clients decreased	53%	54%	64%
Hourly/daily rates have reduced overall	25%	31%	44%
Clients want to reduce rates	24%	33%	50%
Looking for completely different work outside of interpreting/translation	18%	19%	50%

30% of respondents said they had been doing new work that had arisen as a direct result of the pandemic. Most commonly cited categories of work were: organisational procedures and policies, including health and safety documents; stakeholder communications about how organisations had been dealing with and performing in relation to the situation, and to keep employees up to date and engaged; a variety of healthcare-related work, including clinical trials, COVID testing, medical reports, medical device literature, NHS materials; and promotional material for products and services.

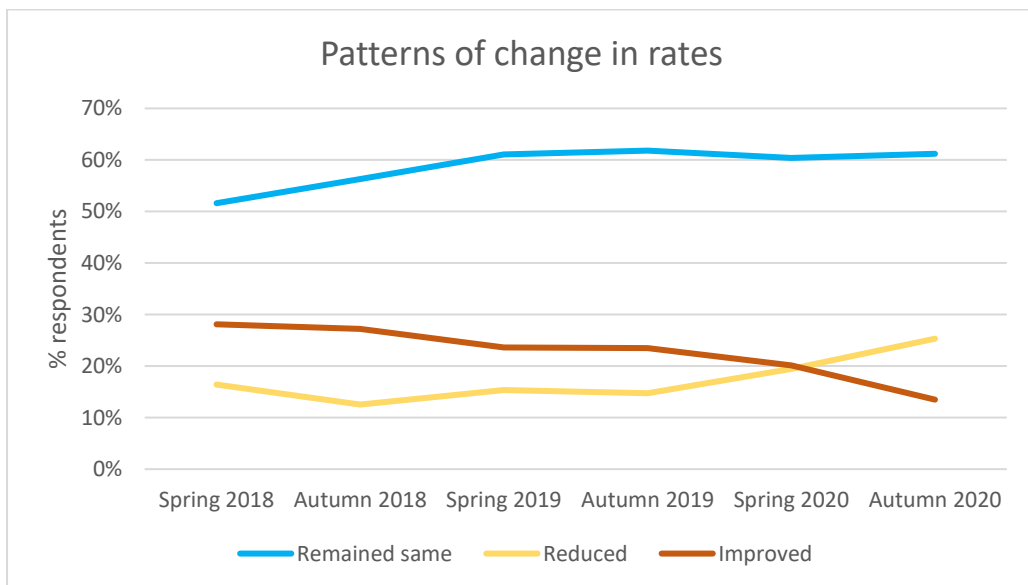
Over the whole period since the Pulse Surveys began in spring 2018, we can see that member positivity about the marketplace has shown a decline since the first survey, most likely fuelled initially by developments around Brexit, with the most marked decrease then occurring early in the COVID-19 pandemic (spring 2020). We have subsequently seen a recovery of about 10% in the latest survey.



Another marked trend has been the increase in the proportion of respondents receiving less work from existing clients over the previous 12 months, also noticeable from the autumn 2018 survey onwards (24%>54%).



However, despite pressure from clients to reduce rates, this has generally not translated into a pattern of falling rates for respondents. The largest proportion of respondents have maintained their rates over this period, with this actually rising over the period the Pulse Surveys have been taking place (51%>61%).



Catherine Park, Pulse Survey project manager, commented: “It is good to see some increased positivity among members since the spring, despite the continuation of challenging market conditions. Our core measures have generally not shown improvement since the last survey. This result may relate to respondents having now formulated their strategy for business during the pandemic and some new types of work emerging over this period, along with the government’s COVID support grant scheme.”