











# LIVECOM ALLIANCE EUROPEAN INDUSTRY SURVEY 2017

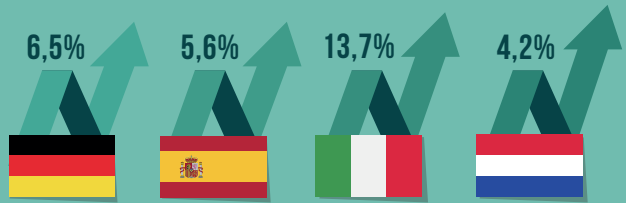
## BUDGET TREND

	DECREASE		SAME		INCREASE	
	2016	2017	2016	2017	2016	2017
 NETHERLANDS	14%	1%	30%	57%	56%	42%
 BELGIUM	31%	0%	42%	41%	27%	59%
 SPAIN	19%	1%	46%	16%	35%	84%
 GERMANY	14%	9%	59%	54%	27%	37%
 ITALY	21%	9%	30%	56%	49%	35%
 UK	6%	6%	74%	72%	20%	22%
 PORTUGAL		21%		59%		21%
<b>AVERAGE</b>	18%	7%	47%	51%	36%	43%

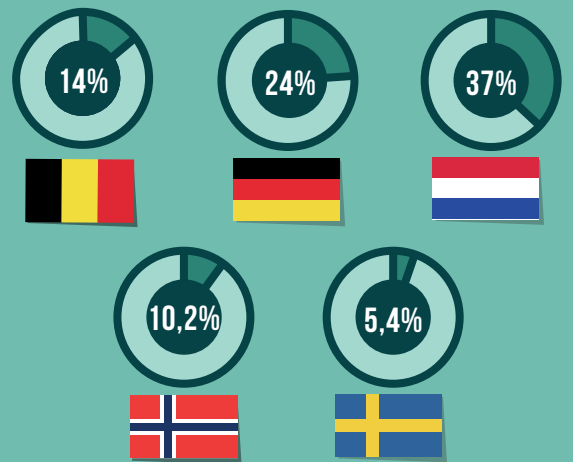
## NUMBER OF EVENTS

	DECREASE	SAME	INCREASE
 BELGIUM	20%	19%	61%
 NETHERLANDS	1%	33%	66%
 UK	7%	38%	55%

## BUDGET FORECAST



### LIVE COMMUNICATION SHARE IN MARCOM MIX






## LEAD TIMES

- 20% clients <3 months ('16 same, '15 49%) 
- 57% still strong tendency to improvise last minute and 33% still last minute 
- 60% start on time; 40% still last minute 




### Growth vs return on projects

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- high expectations and stagnating budgets 
  - 'doing more with less' familiar mantra 
  - budgets too low to meet ambition / business goals 
  - improving margins key challenge in '17 
  - 89% faced challenges improving margins 
  - changing business models adversely impact profits

### Talent

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- 97% face challenges finding and retaining talent 
  - 33% encounter inadequate HR which impacts talent development and retention 

### Converging marcom disciplines

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- 70% frequently or periodically collaborate with other agencies 
  - 64% expect collaborations to increase in '17 

### Trends

Human factor/the conversation  
Atypical formats  
Immersive digital experiences  
Efficiency/reduction of costs  
Reliability Integrated concepts