

PRESS RELEASE

Dortmund, January 14, 2020

The LiveCom Alliance European Industry Survey captures the major trends, challenges and economic impact drivers in the live communication industry. The fourth edition, conducted by the renowned R.I.F.E.L. Institute, reveals valuable insights and figures from 8 key European markets.

Industry Survey 2019

Eight (out of nine) LiveCom Alliance (LCA) member countries were included in the survey: Germany, Italy, Netherlands, Spain, France, Austria, Portugal and Switzerland. We defined two country zones, based on the gross domestic product (GDP) per capita of the respective countries. This resulted in country zone 1 (Spain, Italy & Portugal) and country zone 2 (Germany, France, Netherlands, Austria & Switzerland). Thereafter we identified three types of agencies operating in these zones: generalists (34%), corporate & internal specialists (41,5%) and exhibition experts (24,5%).

The survey shows that the nine participating associations represent 700 national member agencies, who have an extrapolated economic impact of € 8,2b sector turnover and a 55.000 employee workforce.

Live communication budgets

Looking at the clients' figures, budgets show a slight decline in growth for 2019/2020. A downward trend, especially in country zone 2. This reticence is mainly caused by the increasingly challenging business environment, due to cooling down of the European and global economy. Nevertheless 20% in country zone 2 is optimistic about the budget development next year.

Against this background it becomes even more important to anticipate on trends and proactively face the sector's challenges.

Industry challenges

A glance at the future shows that **sustainability** and a **potential lack in availability of qualified personnel** are expected to be the main challenges for most of the agencies. Growing internal (**work-life-balance**) and external (increasing customer demands) tensions can induce stress that needs to be managed effectively.

Trends

We identified **emotionalization** and **digitization** as the dominant trending topics. Incorporating both trends simultaneously is challenging yet rewarding. Thirdly we point out **sustainability** as an overarching future trend that radiates into all activities within the sector.



Full report

The full report published by LCA in conjunction with R.I.F.E.L. Institute offers valuable insights and concrete data benchmarking the live communication industry on a pan-European level. It publishes accurate and relevant figures on for instance agency payroll breakdown, turnover breakdowns, freelancer rates and clients' forecasting insights. The report is available in full through [this link](#).

Validation

The European Industry Survey aims to capture the major trends and economic impact drivers for the live communication industry in the world's biggest free trade area. This 2019 edition is a fourth step towards building a comprehensive overview of this important industry. Therefore LCA collates data provided by the national members of its participating associations, for the first time conducted by the renowned German R.I.F.E.L. Institute. LCA will produce future editions of the survey regularly.

About LiveCom Alliance

LCA is the independent European institute for live communication. We believe that live encounters do build a stronger future in all societies and industries, especially in this digital day and age. LCA unites national boards of associations, each representing local member agencies in the live communication and event domain. Goal of the Alliance is to unite, learn and inspire. Currently serving 9 national organizations and affecting 700 leading agencies around Europe. Other than the annual European Industry Survey, LCA issued a pan-European [Code of Ethics](#) and [Pitch Guidelines](#).

Note to editors, not for publication

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Enclosed

Infographic LiveCom Alliance European Industry Survey 2019