

LIVECOM ALLIANCE EUROPEAN INDUSTRY SURVEY 2025

Follow Up Study

A survey of the R.I.F.E.L. e.V. on behalf of the LiveCom Alliance
December 2025

The bottom half of the slide features a dark blue background with abstract circular patterns in shades of green and white. The text "European Institute for Live Communication" is centered in a bold, green, sans-serif font.

**European Institute for
Live Communication**

EUROPEAN INDUSTRY SURVEY

Unlocking international growth in live communication

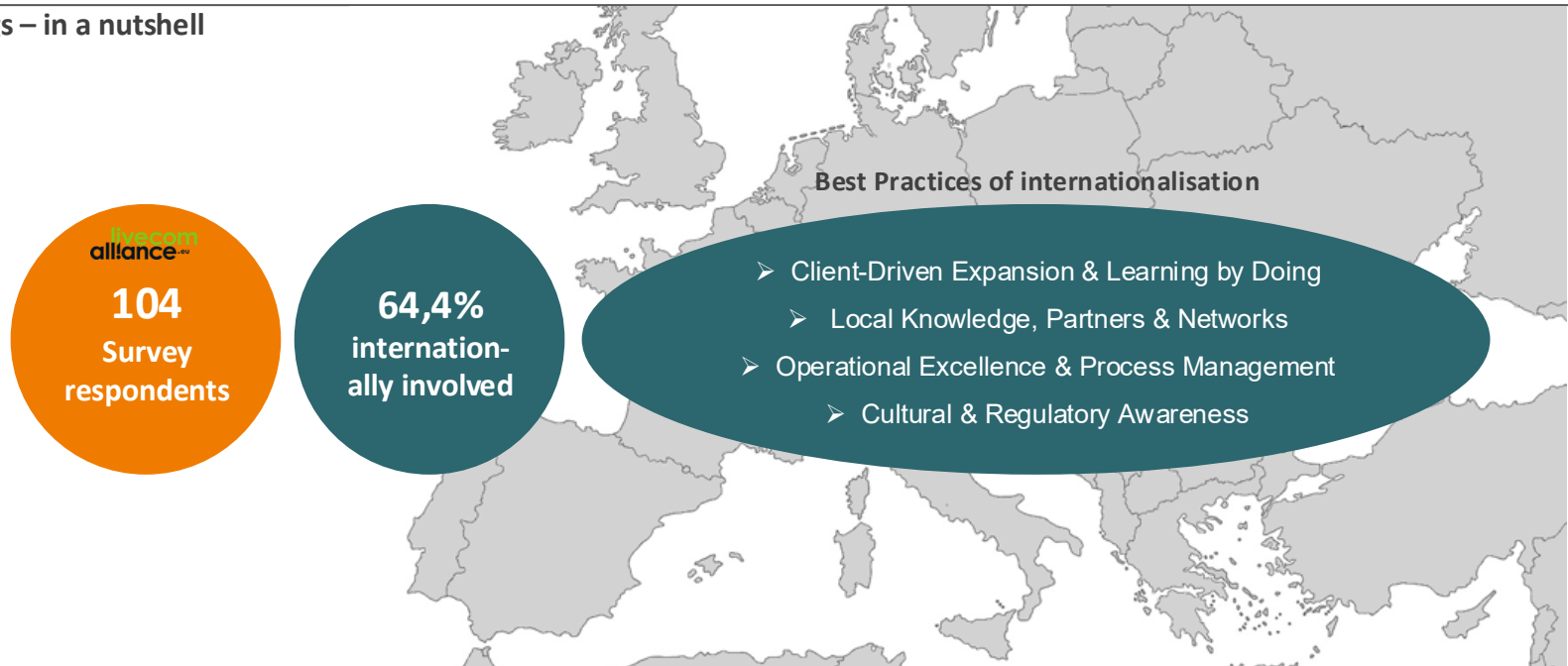
1 Key findings



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Key findings – in a nutshell



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- A total number of 104 companies (63 Organizers / Agencies and 41 Suppliers) from 7 European countries participated in the LiveCom Alliance Follow-up Study 2025.
- The Companies are mostly optimistic about the future of the organization (8,1 Points from 10). Austria and the Netherlands are particularly optimistic. Germany and France are somewhat less optimistic.
- The current occupancy rate of the organization for the month October 2025 compared to October 2024 is 86,2% over all. The occupation rate of organizers of event is at 94,4%. The occupation rate of suppliers is only at 76,9%. The occupancy rate is in Austria and Switzerland.
- Overall, the study provides an interesting overview of the development of internationalization in the LiveCom industry. Two-thirds (68,2%) of the companies surveyed are internationally involved. 26,9% are actively working on expanding their business abroad.
- The success factors for internationalization in the live communication sector are client driven expansion, learning by doing, local knowledge, partners and networks, operational excellence and process management as well as cultural and regulatory awareness.

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- Five Clusters were identified with regard to unlocking international growth in live communication: „Inward Focused Companies“ did not have the ambition to do business abroad, „National Operators“ has not done business abroad, „Aspiring Explorers“ are actively exploring how to do business abroad, „International Players“ are internationally active, „International Advancers“ are actively working on expanding their business abroad.
- Current bottlenecks for the companies to take the next step in going international are for example revenue uncertainties, limited understanding of the local client and market, secondment and tax-related efforts. It's not easy to hire employees and find local partners who speak the same language and have the same quality. The guarantees of sustainable revenue growth are fragile. It's difficult to develop a business infrastructure and a media network in a new country
- 35,6% of the companies that are currently not internationally involved. But only 13,5% did not have the ambition to do business abroad. Reasons for this are the focusing of the home market, sufficient domestic business, high costs, scarce resources and capacities, personal constraints, legal, regulatory and structural barriers.

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2 Study design



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Targeted companies:	Live Communication across Europe
Method:	Online survey
Field time:	Autumn 2025
Sample:	104 companies (63 Organizers / 41 Suppliers)
Implementation:	LiveCom Alliance in cooperation with the R.I.F.E.L. Institute

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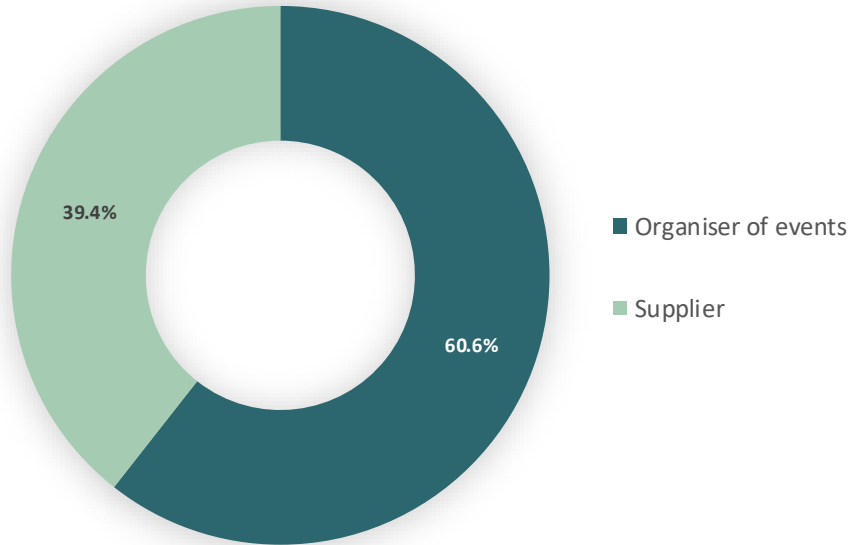
3 General overview of the sample



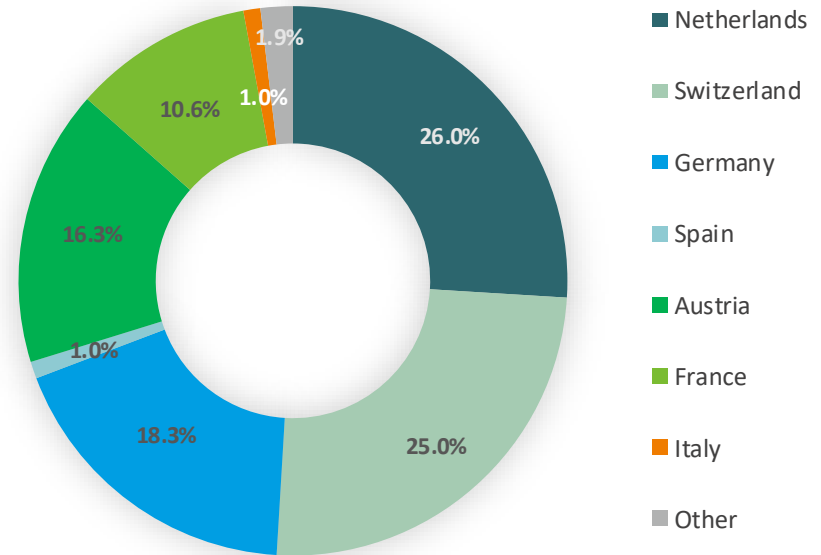
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Based on the services that companies offer –
what describes your company best?



Where is your headquarter located?

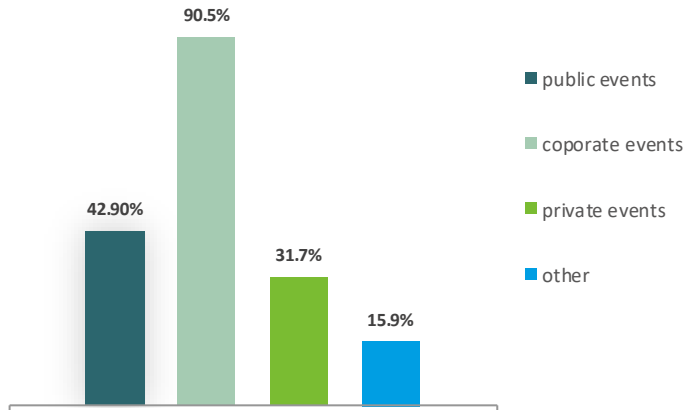


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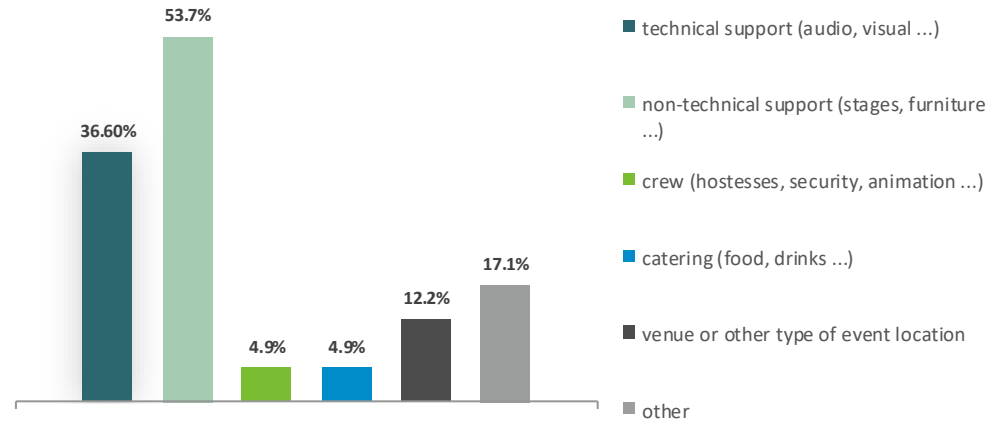
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Based on the services that companies offer – what describes your company best?
- Specification of the company type / business areas -

Organisers of Events



Suppliers



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Based on the services that companies offer – what describes your company best?

- Specification of the company type / business areas -

Organisers of Events: others

- 1 Congresses and Exhibitions (N=5)
- 2 Focus events (e.g. healthcare) (N=4)
- 3 Awards (N=1)

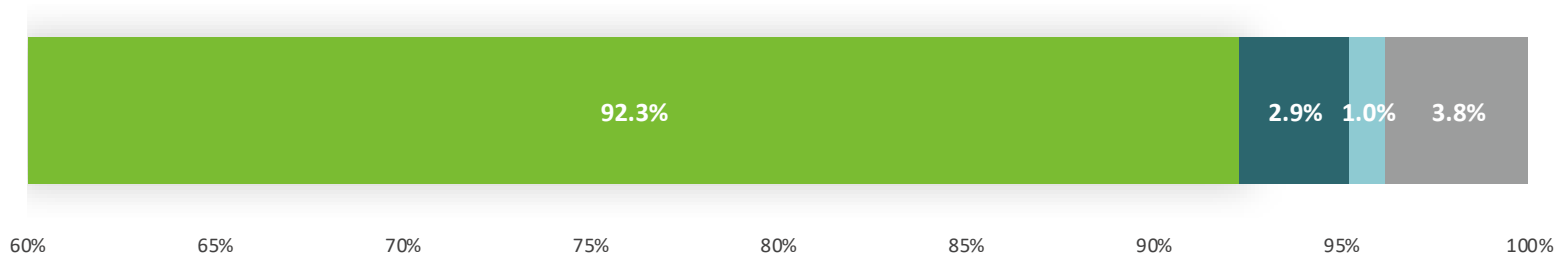
Suppliers: others

- 1 Stand building (N=4)
- 2 Electrical installation / electrical infrastructure (N=2)
- 3 Interior design (N=1)

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I am professionally active in the event sector as ...



■ an employee or manager in an organisation active in the profit sector

■ an employee or manager in an organisation active in the non-profit sector

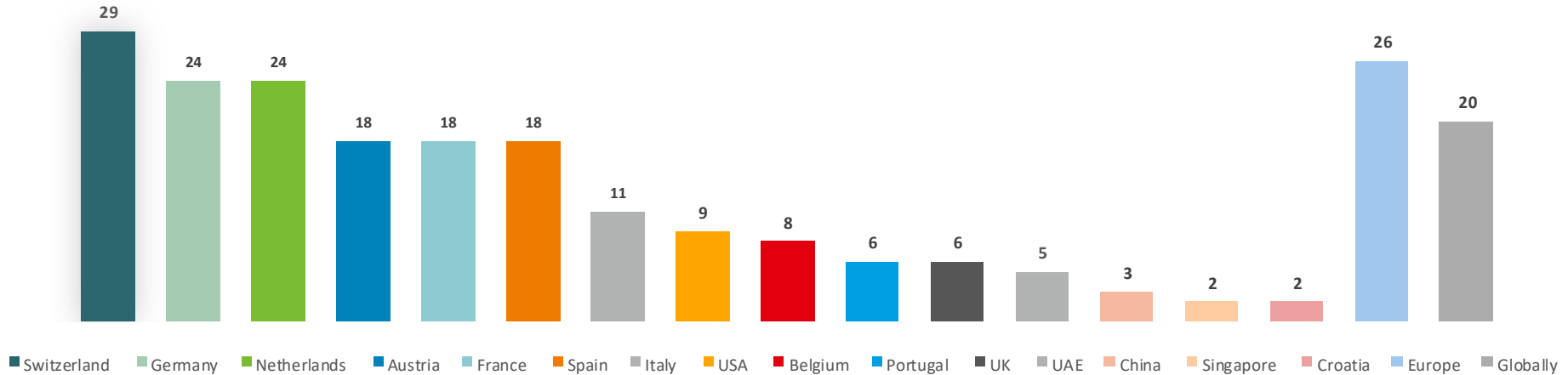
■ an employee in an organisation active in the public sector

■ a freelancer – sole proprietorship (max turnover 200k p/year)

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In which countries are you active or involved in the organisation, support and/or supply to events?



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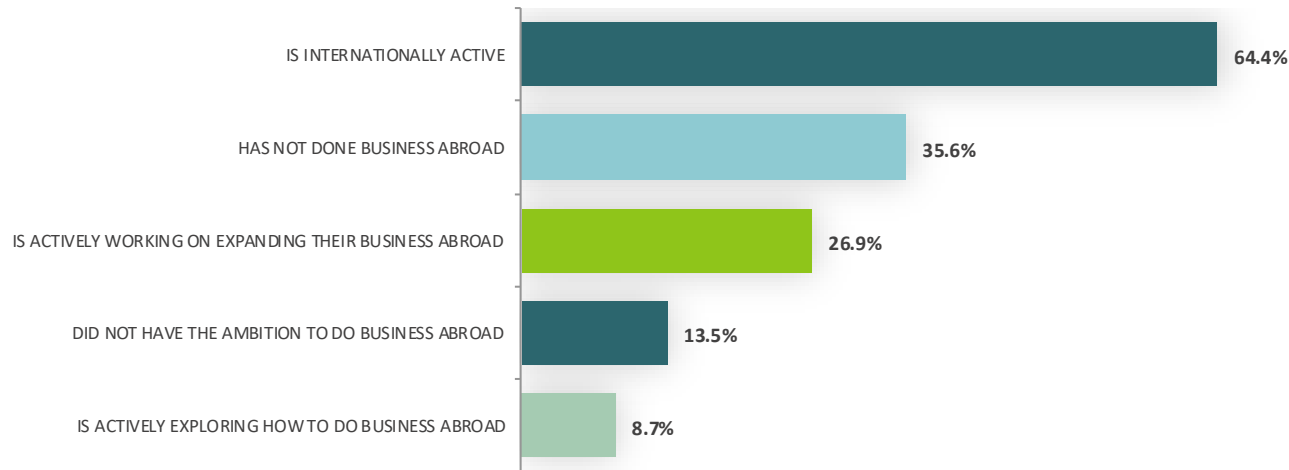
4 International Involvement



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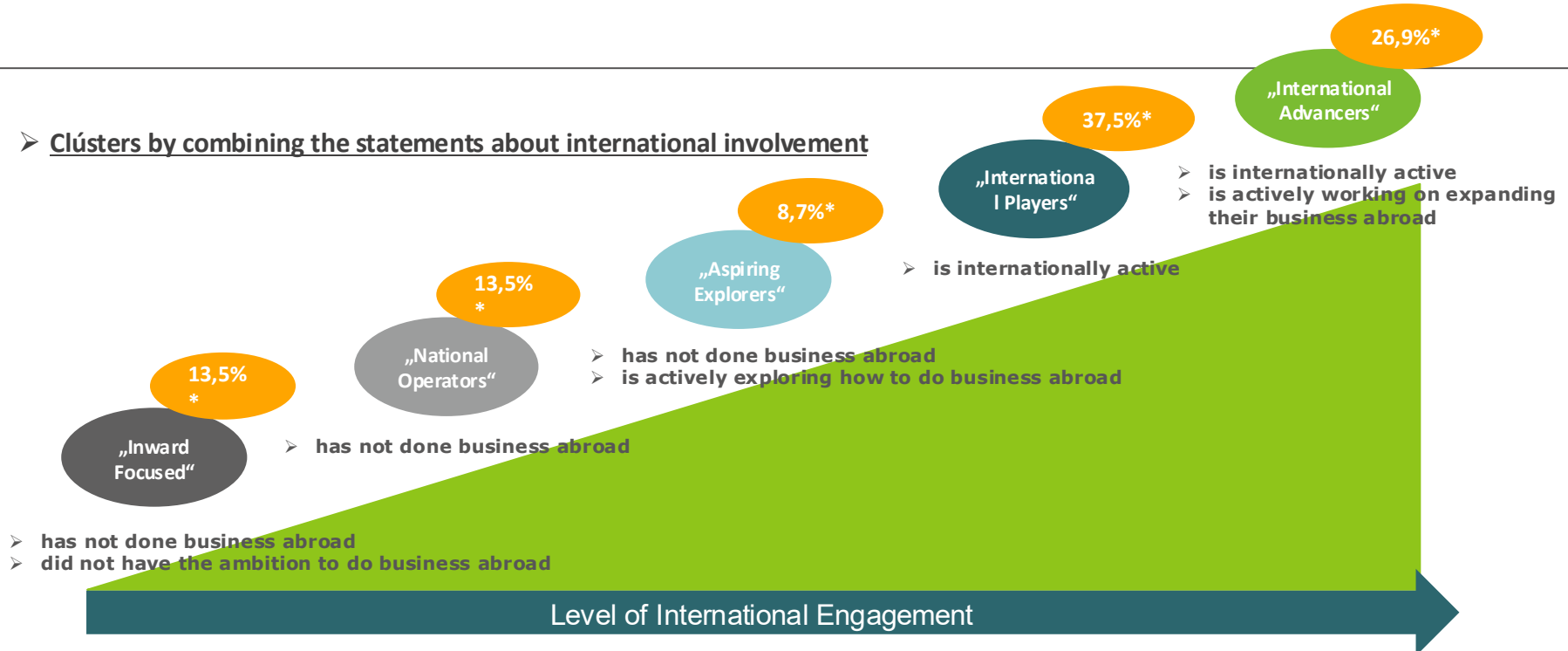
The past year, the organization I work for (the most) ...
(Multiple answers possible)



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➤ Clusters by combining the statements about international involvement

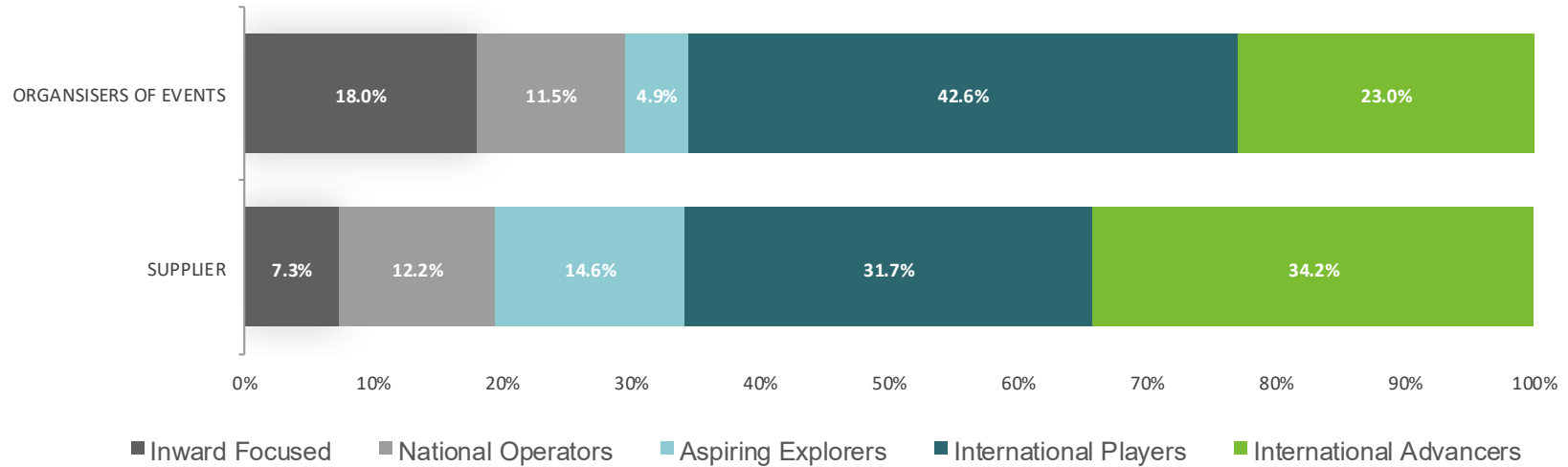


*Proportion of respondents belonging to each cluster

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➤ Clústers by combining the statements about international involvement



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What was the journey to go international like for your organisation? Which learnings / best practices can you advise colleagues in the sector who want to go international as well?

(open ended)

1

Client-Driven Expansion & Learning by Doing

“Our international expansion was always driven by the client and their potential business events projects.”

“This was client led mostly.”

“Learning by doing.”

“Our clients wanted to have events in other countries. Advise: look for reliable local partners. They can help you.”

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What was the journey to go international like for your organisation? Which learnings / best practices can you advise colleagues in the sector who want to go international as well?

(open ended)

2

Local Knowledge, Partners & Networks

“Always find local partners.”

“Find local partners with whom you click. Local knowledge and collaboration is key.”

“Work with local companies. They have the knowledge of the destination and the work ethics in the country.”

“Start small with one or two anchor markets, invest in local partners who understand the culture, regulations, and business dynamics.”

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What was the journey to go international like for your organisation? Which learnings / best practices can you advise colleagues in the sector who want to go international as well?

(open ended)

3

Operational Excellence & Process Management

“Site visits are crucial, visit the venues you are going to use multiple times. See how they work. Try to see similar events in execution and evaluate the level of execution.”

“Build strong network. International educated staff. Strong L&D department. Strong assessment capabilities. Strong financial foundations.”

“Important stages in our expansion: Network development and international partnerships ... Logistics & materials management ... Regulatory differences ... Cultural differences in design understanding.”

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What was the journey to go international like for your organisation? Which learnings / best practices can you advise colleagues in the sector who want to go international as well?

(open ended)

4

Cultural & Regulatory Awareness

“Know the local rules and habits.”

“Different countries - different rules and regulations.”

“EU: be aware of the different laws regarding working time, which you have to follow, when you work in these countries.”

“Managing different time zones and cultural knowledge.”

“You need the right person abroad and be aware of all the legal details of founding but also employer rights.”

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What were the reasons for your organisation not wanting of doing business abroad?

(open ended)

1

Focus on Home Market / Sufficient Domestic Business

“All locations are located in the Netherlands.”

“Enough business at home.”

“We are organizers of big sports in events in Austria. We want to stay in this region with our events.”

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What were the reasons for your organisation not wanting of doing business abroad?

(open ended)

2

Cost, Resource & Capacity / Personal Constraints

“As a Swiss company, our salaries ... are significantly higher than in the EU or abroad. For this reason, it is challenging to secure contracts internationally.”

“Due to the size of the company, capacity was limited.”

“It puts more pressure on my private life and production of other events because mostly it's multiple days abroad which mean multiple days hardly working on other events.”

“It is time consuming and not really profitable, but our clients want us to assist abroad.”

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What were the reasons for your organisation not wanting of doing business abroad?

(open ended)

3

Legal / Regulatory / Structural Barriers

“Dealing with differences in legal context, particularly with the employment conditions of recruiting local employees, combined with all the regulations of completely different legislation.”

“Lack of security, strong Swiss franc, production costs, and missing clarity about legal regulations.”

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What are the bottlenecks for your organisation to actually take the next step in going international?

(open ended)

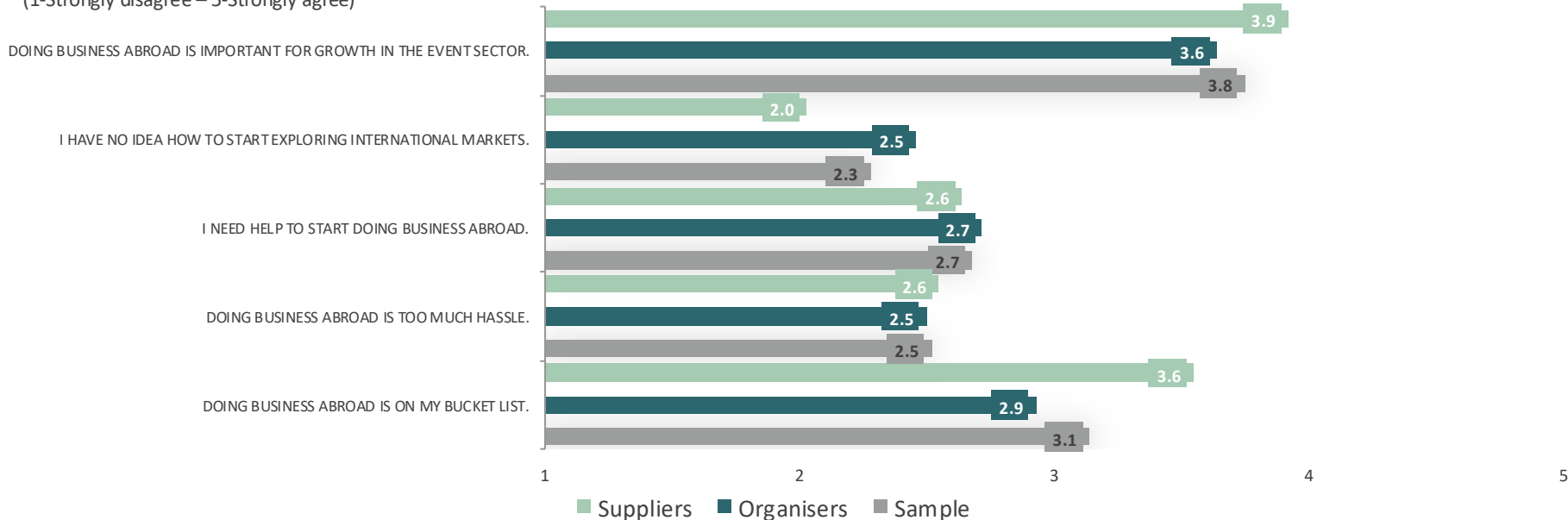
- 1 Revenue uncertainties, missing local partners, limited understanding of the local client/market
- 2 Secondment and tax-related efforts (Switzerland and Liechtenstein)
- 3 Need to hire employees in order to take the next step
- 4 There is too much uncertainty, the time investment is high, and guarantees of sustainable revenue growth are fragile
- 5 Talking the same language and have the same quality
- 6 To develop a business infrastructure and especially a reliable partner & media network in a new country

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To which degree do you agree/disagree with the following statements?

(1-Strongly disagree – 5-Strongly agree)

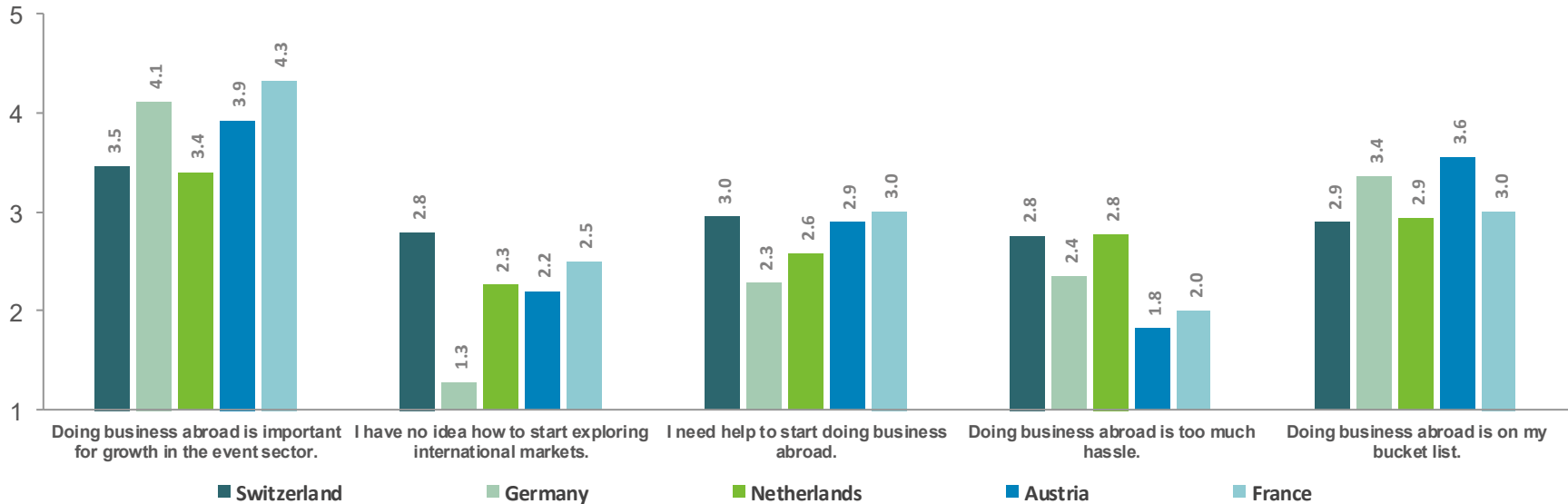


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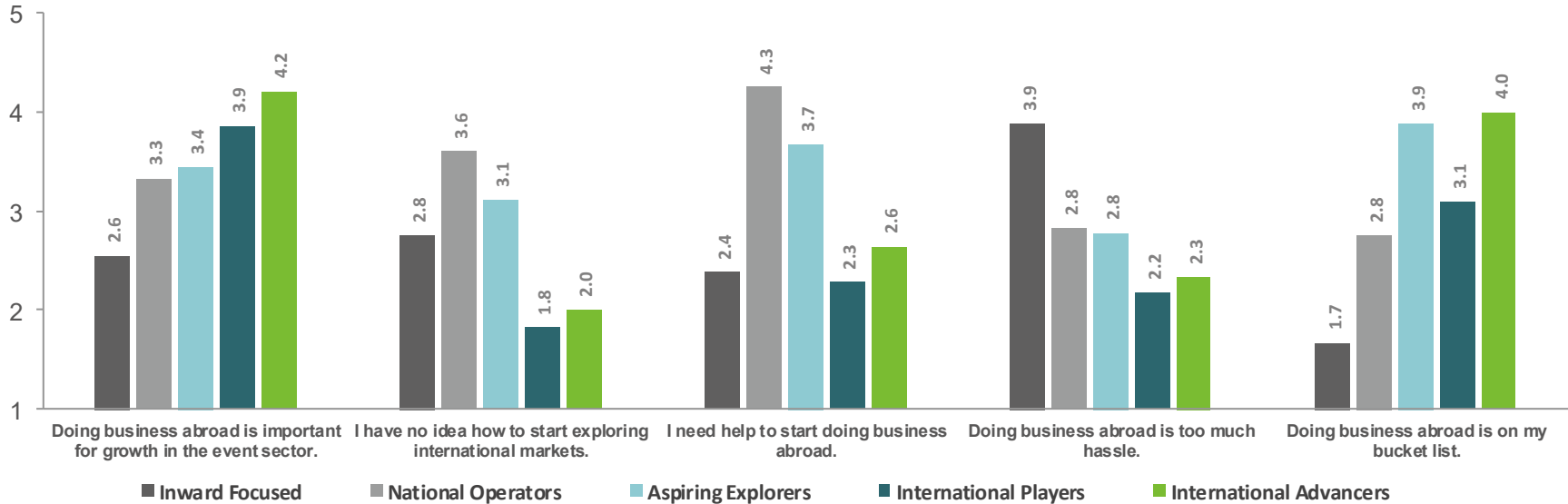


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To which degree do you agree/disagree with the following statements?

(1-Strongly disagree – 5-Strongly agree)



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5 Workforce Status



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What is the current occupancy rate of the organization you (mainly) work for this month (October 2025) compared to 12 months ago (October 2024), expressed as a percentage? Please base your assessment on the organization's total occupancy rate (value added by people), including freelancers.



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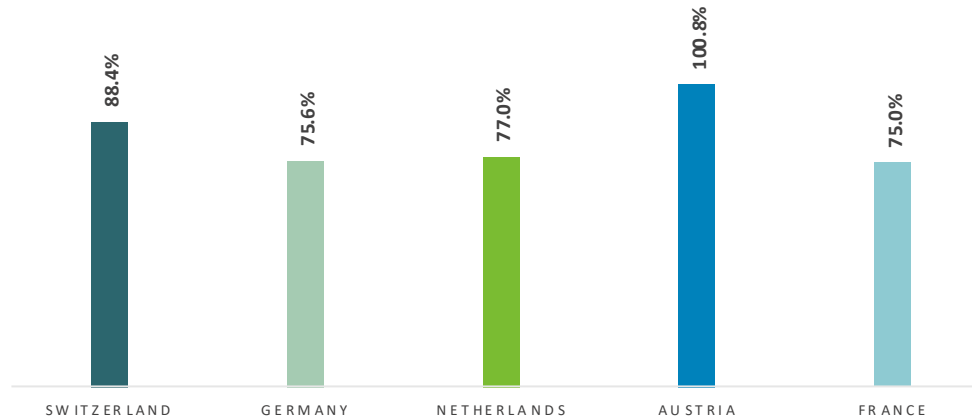


*Average occupancy rate in the respective cluster

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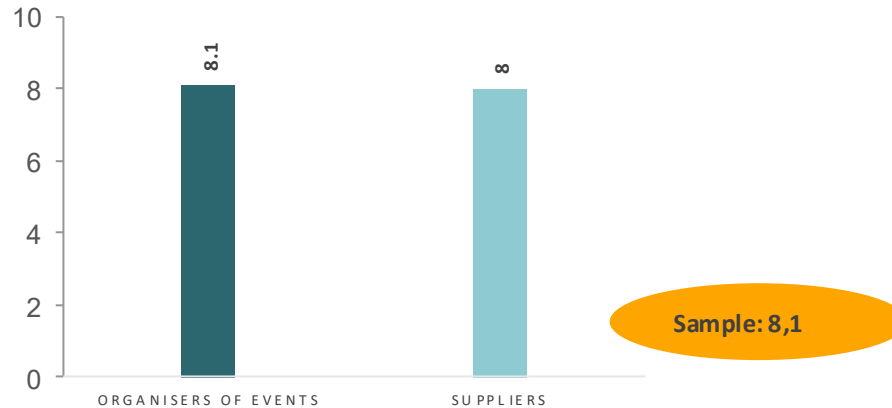
5 Future Outlook



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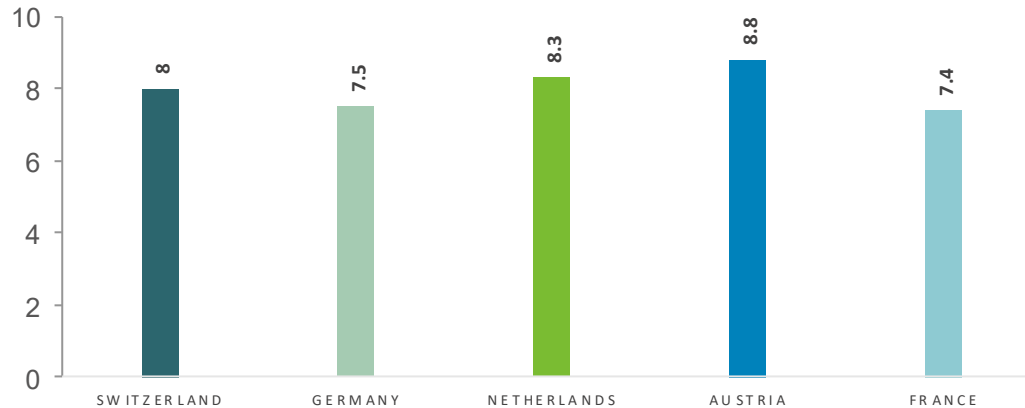
How optimistic are you about the future of the organization you (mainly) work for?
(1-Not optimistic at all – 10-Very Optimistic)



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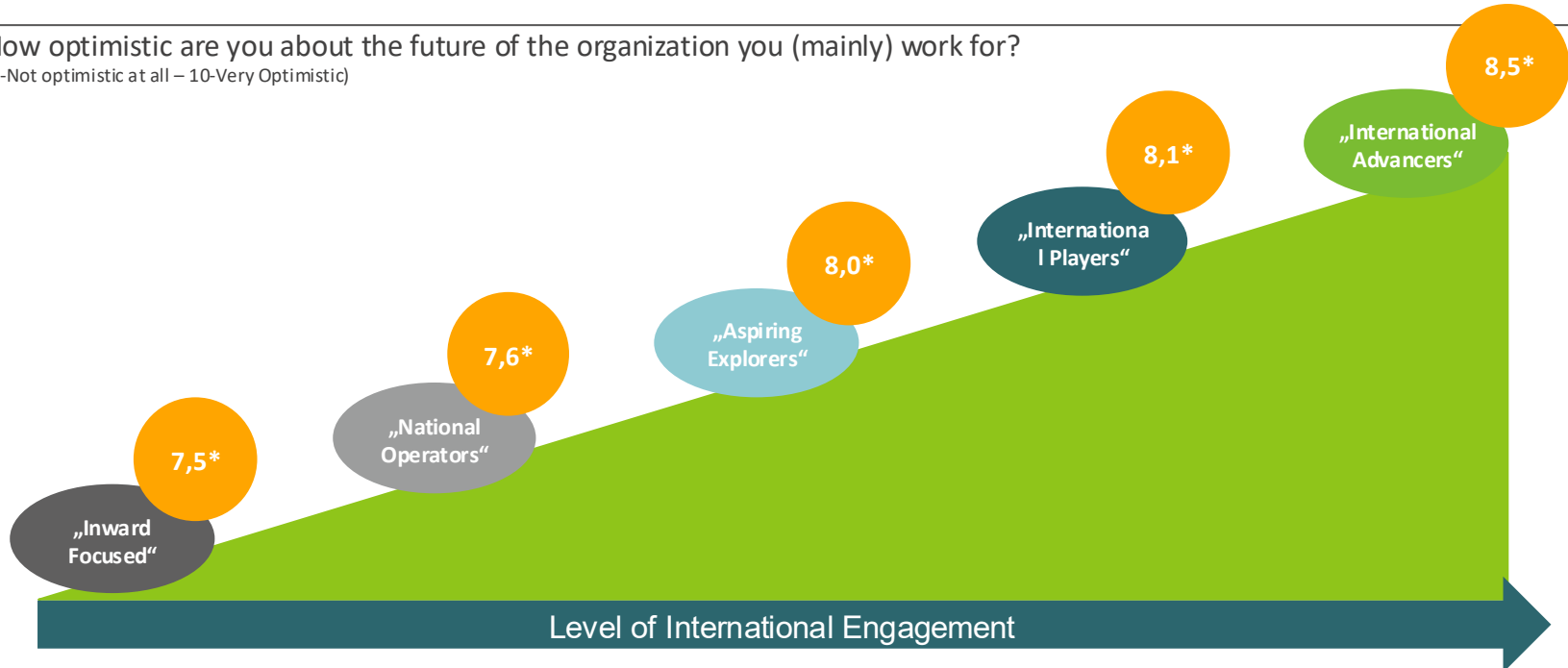
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(1-Not optimistic at all – 10-Very Optimistic)



*Average rating in the respective cluster

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What knowledge or support would you like to receive for your organisation to start or continue your international journey? (open ended)

1

International Networks & Market Access

Respondents emphasise the critical role of having access to trustworthy and well-established international networks. This includes connecting with reliable partners, suppliers, clients, and other stakeholders in target markets. Organisations expressed a need for support in building these networks quickly and effectively to enable collaboration, facilitate market entry, and strengthen their international presence. Expanding networks is seen as a prerequisite for offering full-service solutions and successfully executing cross-border projects.

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What knowledge or support would you like to receive for your organisation to start or continue your international journey? (open ended)

2

Market Knowledge, Guidance & Best Practices

Many organisations highlighted the importance of having detailed and practical information about international markets. This encompasses insights into local market conditions, customer expectations, regulations, and emerging trends. Respondents also value access to best practices, case studies, and the experiences of other companies to learn from common challenges, avoid pitfalls, and optimise their internationalisation strategies. Guidance, coaching, and structured information are particularly sought to make informed decisions in unfamiliar markets.

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What knowledge or support would you like to receive for your organisation to start or continue your international journey? (open ended)

3

Legal, Regulatory & Operational Support

A major challenge for respondents is navigating the complex legal and regulatory environment when operating abroad. Support is requested in areas such as local legislation, taxation, employment law, permits, insurance, and compliance requirements. Organisations also seek practical assistance for operational tasks, including local entity set-up, staff secondment, and ensuring uniform procedures across countries. Access to advisory services that understand the event industry and can provide hands-on guidance is particularly valued.

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What knowledge or support would you like to receive for your organisation to start or continue your international journey? (open ended)

4

Limited Demand, Uncertainty & Entry Barriers

Some respondents indicate that international expansion is not a current priority or that they face significant barriers to entry. This includes a lack of clarity about where and how to start, perceived high costs (e.g., as a Swiss company), limited resources, and uncertainty about international market conditions. For these organisations, uncertainty and the absence of immediate need prevent active steps towards internationalisation, highlighting a group that may require basic orientation and confidence-building support before taking further action.

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6 Country Focus: Belgium



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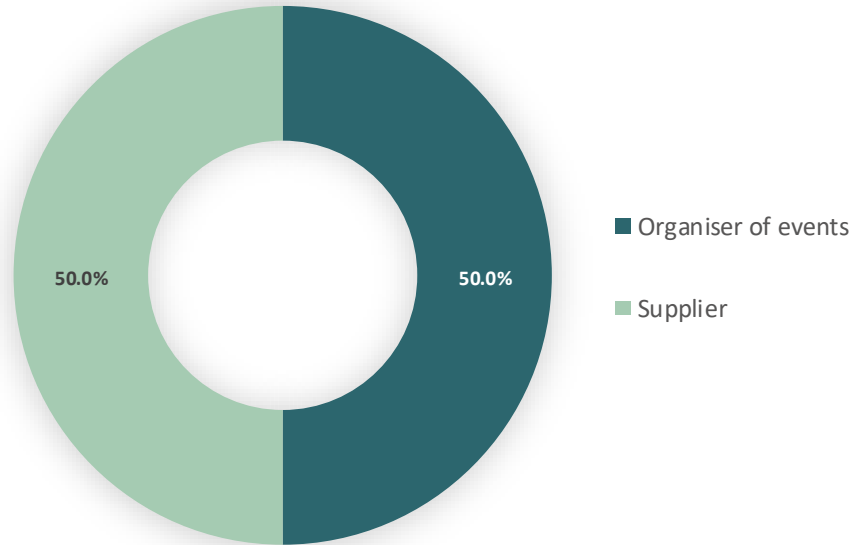
Targeted companies:	Live Communication companies in Belgium
Method:	Online survey
Field time:	Autumn 2025
Sample:	72 companies (36 Organizers / 36 Suppliers)
Implementation:	LiveCom Alliance

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Based on the services that companies offer –
what describes your company best?

Country Focus: Belgium



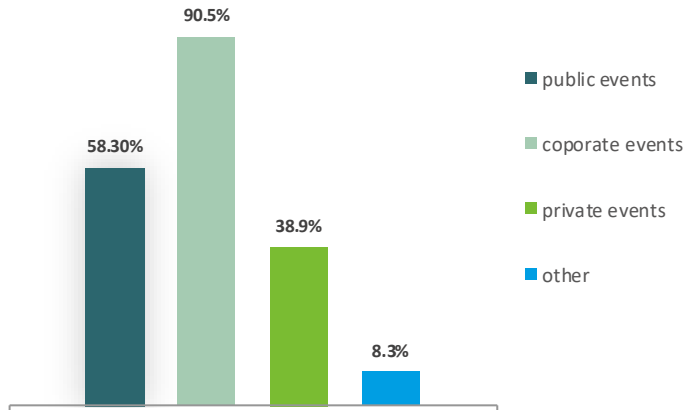
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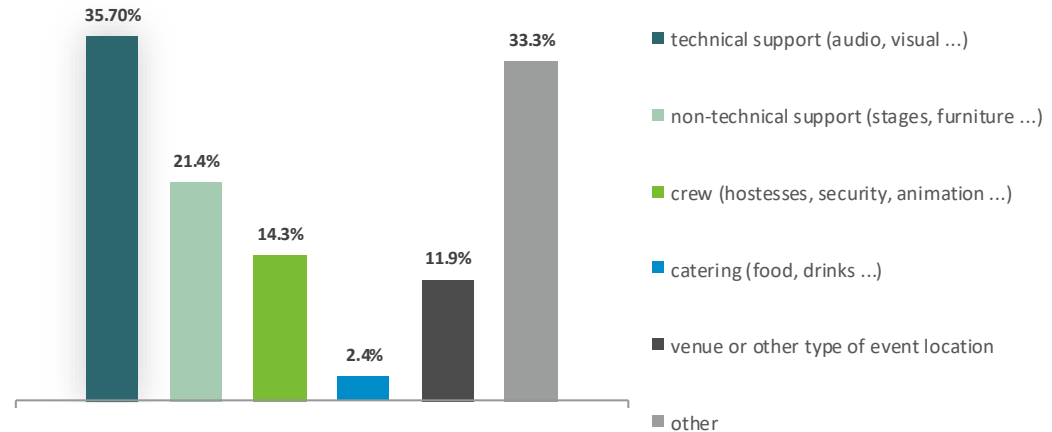
Based on the services that companies offer – what describes your company best?
- Specification of the company type / business areas -

Country Focus: Belgium

Organisers of Events



Suppliers

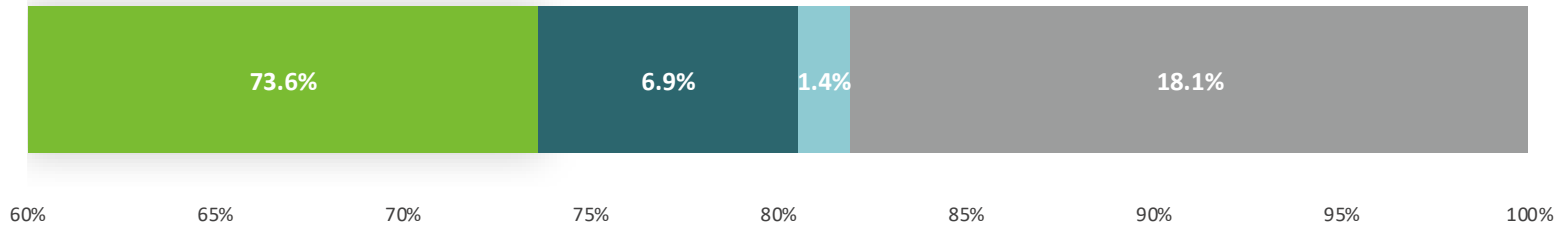


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I am professionally active in the event sector as ...

Country Focus: Belgium



■ an employee or manager in an organisation active in the profit sector

■ an employee or manager in an organisation active in the non-profit sector

■ an employee in an organisation active in the public sector

■ a freelancer – sole proprietorship (max turnover 200k p/year)

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What is the current occupancy rate of the organization you (mainly) work for this month (October 2025) compared to 12 months ago (October 2024), expressed as a percentage? Please base your assessment on the organization's total occupancy rate (value added by people), including freelancers.

Country Focus: Belgium

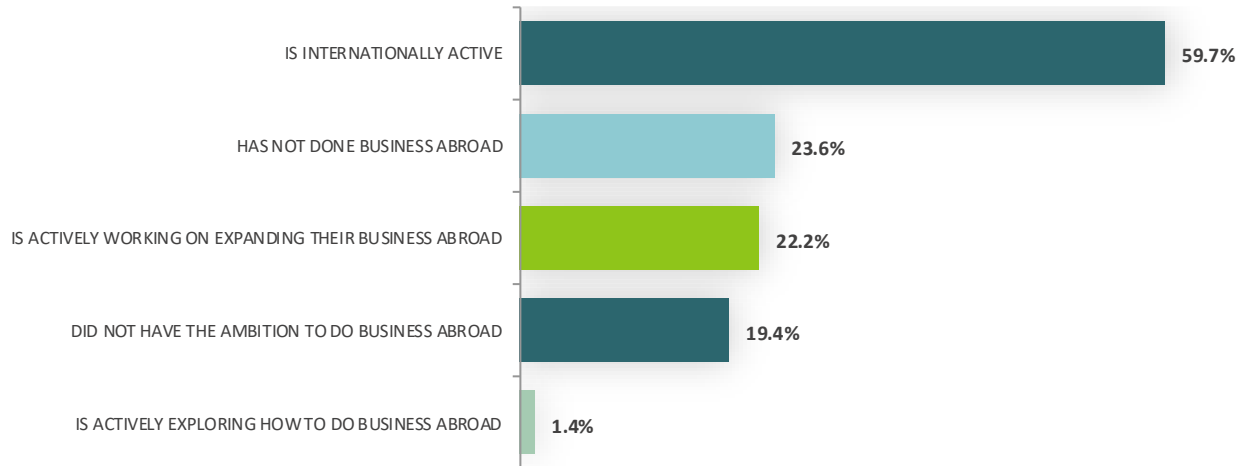


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The past year, the organisation I work for (the most) ...
(Multiple answers possible)

Country Focus: Belgium



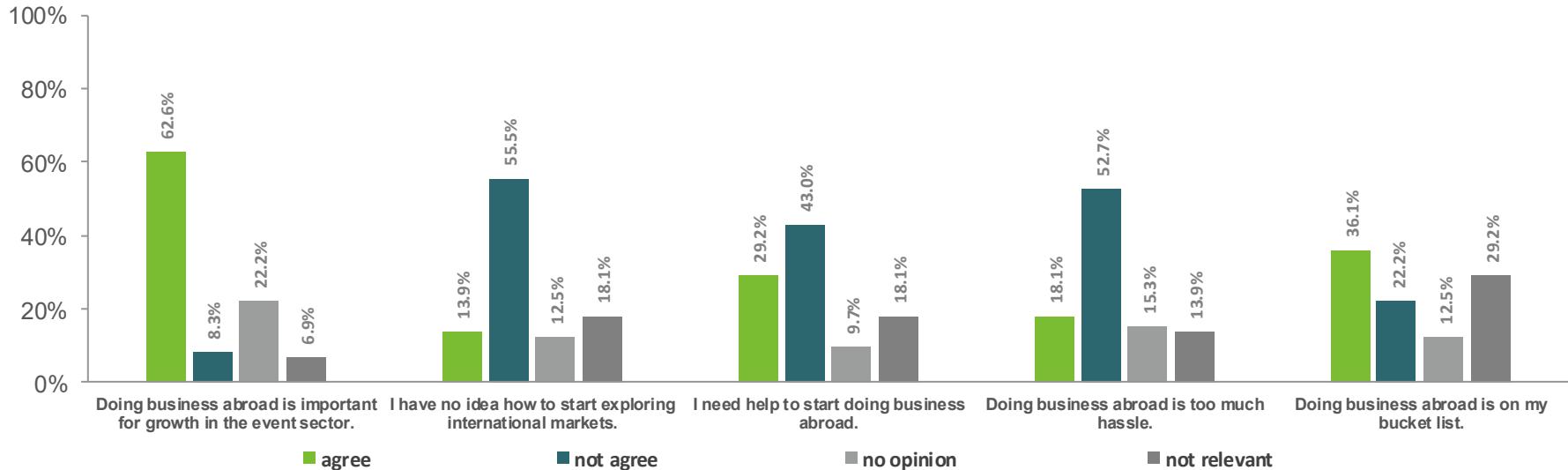
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To which degree do you agree/disagree with the following statements?

(1-Strongly disagree – 5-Strongly agree)

Country Focus: Belgium



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What was the journey to go international like for your organisation? Which learnings / best practices can you advise colleagues in the sector who want to go international as well?

(open ended)

Country Focus: Belgium

“...we can say that organising everything from the home country is rarely optimal, as you miss local customs and because each market needs to be approached differently to achieve optimal results.”

“We are active abroad for certain clients, but we did not consciously prospect internationally. Clients approached us spontaneously with requests to organise corporate events abroad. When I refer to “abroad”, I mainly mean Sweden, France and the Netherlands.”

“You need to speak the language of the markets where you want to be active (literally and figuratively).”

“Just do it — it broadens your view of the world and of your own organisation.”

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What were the reasons for your organisation not wanting of doing business abroad?

(open ended)

Country Focus: Belgium

“For the time being, there is enough work in our own country.”

“None. The opportunity does not present itself, and I do not actively develop in that direction, but I am open to it.”

“It is not that we are unwilling; all activities simply took place in Belgium.”

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What are the bottlenecks for your organisation to actually take the next step in going international?

(open ended)

Country Focus: Belgium

“Employees nowadays (rightly) attach great importance to work–life balance. If we were to be active abroad more frequently, we would need to set up an additional hub. At present, the economic conditions are somewhat too unfavourable to take that step.”

“Regulations abroad are excessively complex and constantly different.”

“With our relatively small organisation, it is harder to miss people for long periods during operationally busy times.”

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What knowledge or support would you like to receive for your organisation to start or continue your international journey? (open ended)

Country Focus: Belgium

“Gaining access to markets; understanding the conditions under which I can practice my profession abroad; finding reliable ad hoc suppliers.”

“VAT rules, required certificates, promotional tools, information on tariffs abroad, work visas.”

“An international platform for our sector with colleagues from different disciplines.”