

LiveCom Alliance European Industry Survey 2018



Budget trend

| | DECREASE | SAME | INCREASE |
|--------------|----------|------|----------|
| NETHERLANDS | 6% | 35% | 59% |
| BELGIUM | 19% | 30% | 51% |
| ITALY | 9% | 51% | 35% |
| UK | 5% | 64% | 31% |
| AVERAGE 2018 | 10% | 45% | 45% |
| AVERAGE 2017 | 7% | 51% | 43% |
| AVERAGE 2016 | 18% | 47% | 36% |

AVERAGE INCREASE 2018

| | |
|---------|-----|
| GERMANY | 5% |
| CH | 14% |
| SPAIN | 16% |

AVERAGE DECREASE 2018

| | |
|--------|-----|
| FRANCE | 10% |
|--------|-----|

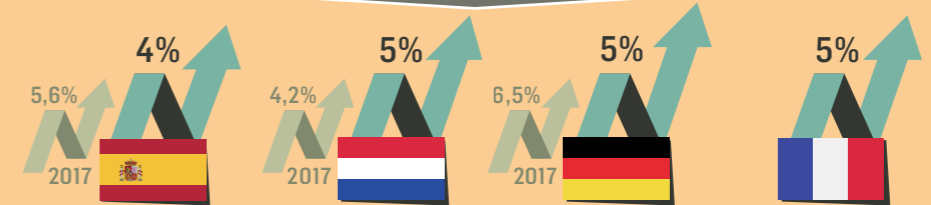
Number of events

| | DECREASE | SAME | INCREASE |
|-------------|----------|------|----------|
| BELGIUM | 20% | 19% | 61% |
| NETHERLANDS | 1% | 33% | 66% |

AVERAGE INCREASE 2018

| | |
|-------|-----|
| SPAIN | 16% |
|-------|-----|

Budget forecast



LIVE COMMUNICATION SHARE IN MARCOM MIX



Challenges



WAR ON TALENT • STAYING TECH-SAVVY • BECOMING PURPOSE-LED

Trends



DATA MINING • GENERATING CONTENT • LIVE AS A STRATEGIC DRIVER