

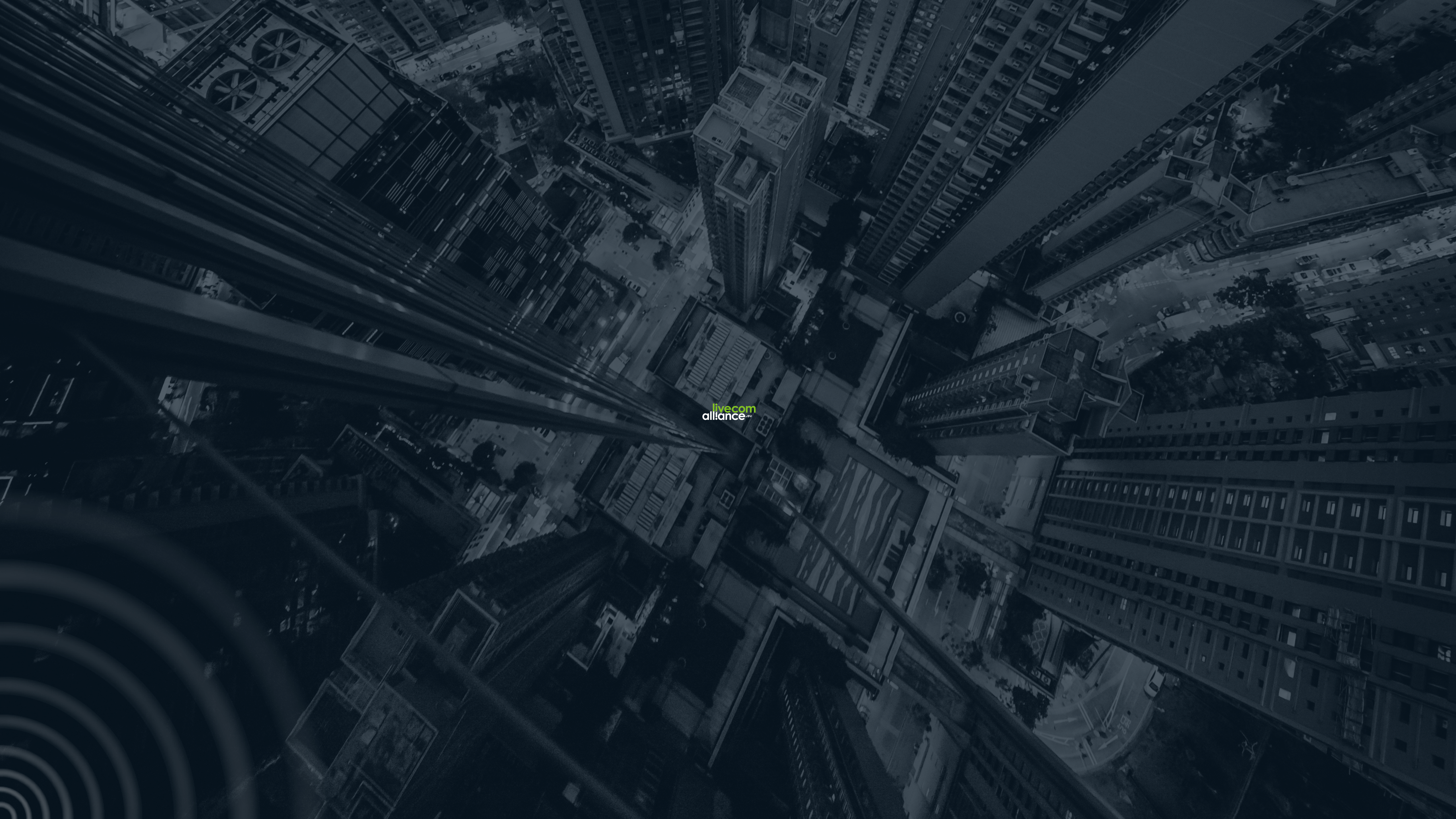


European Institute for Live Communication

European Industry Survey 2020

Online Press Conference - Starts 10:15am CEST

22 June 2021



livecom
alliance



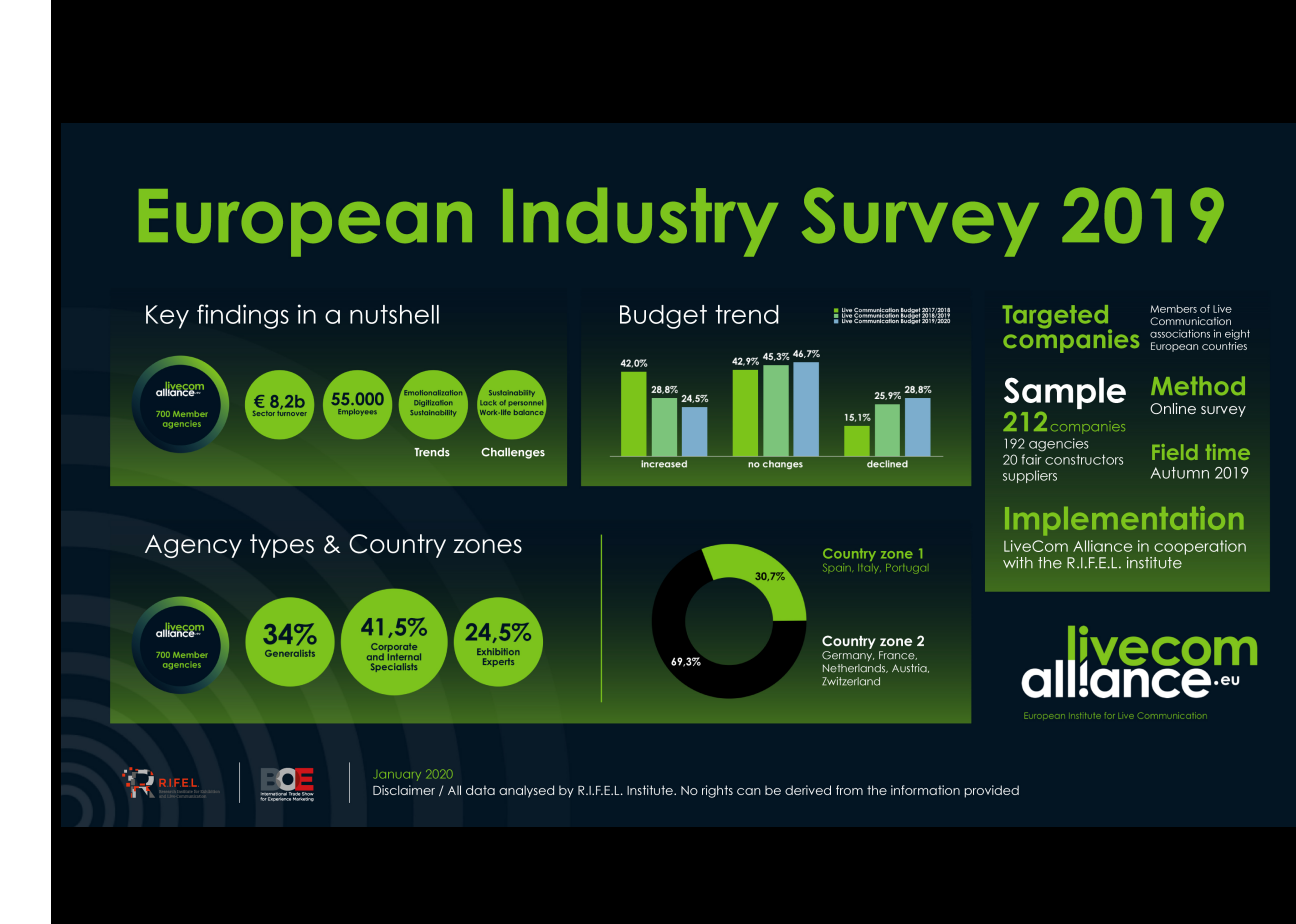
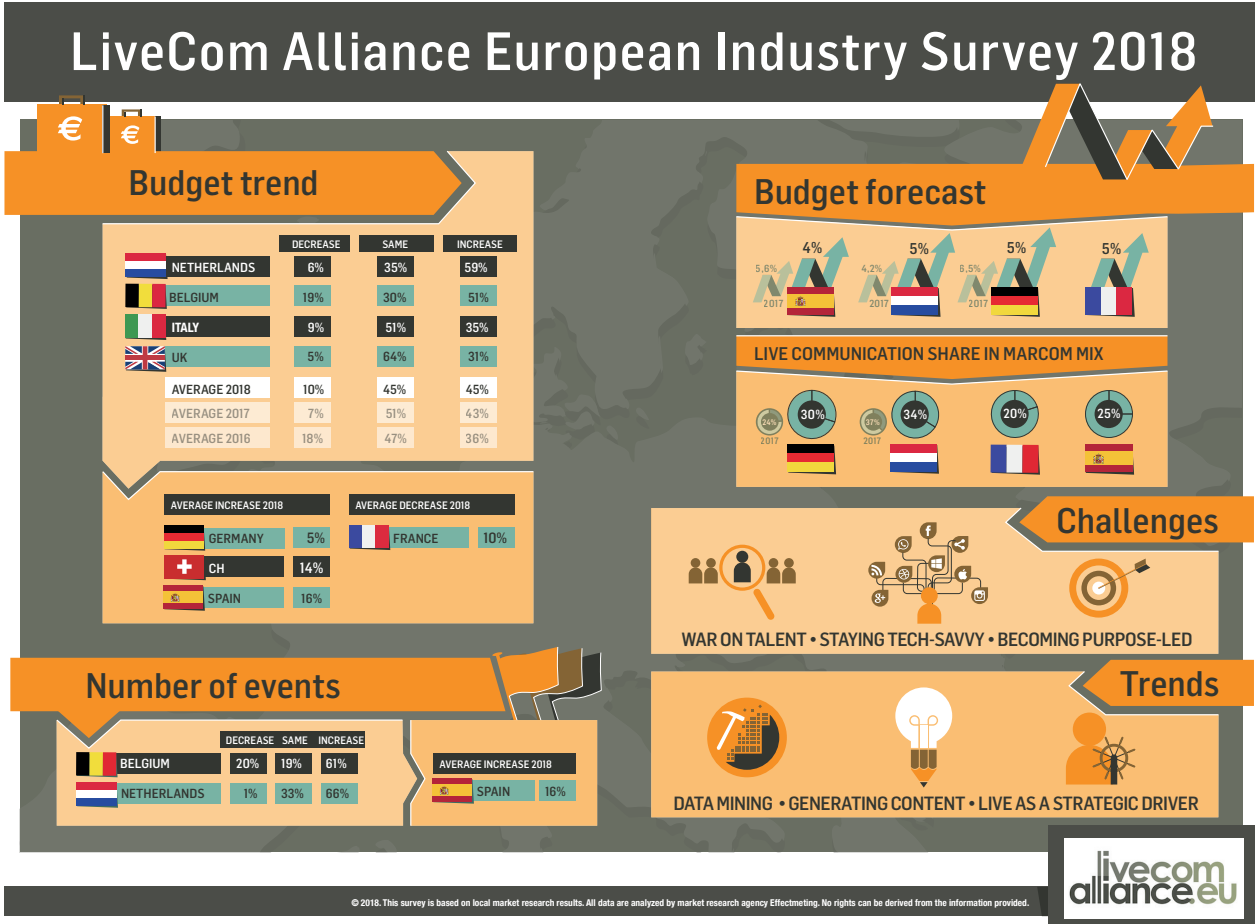
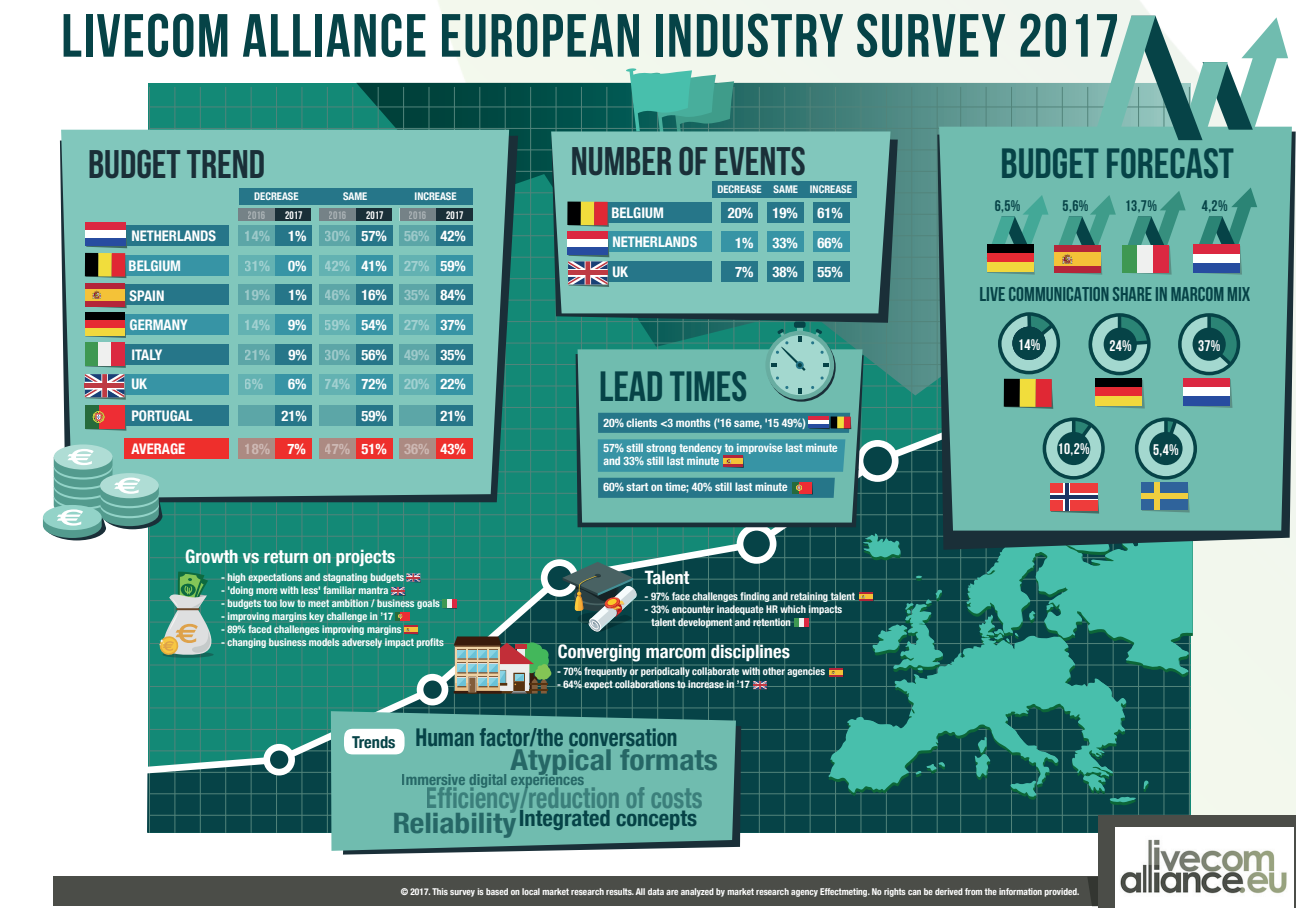
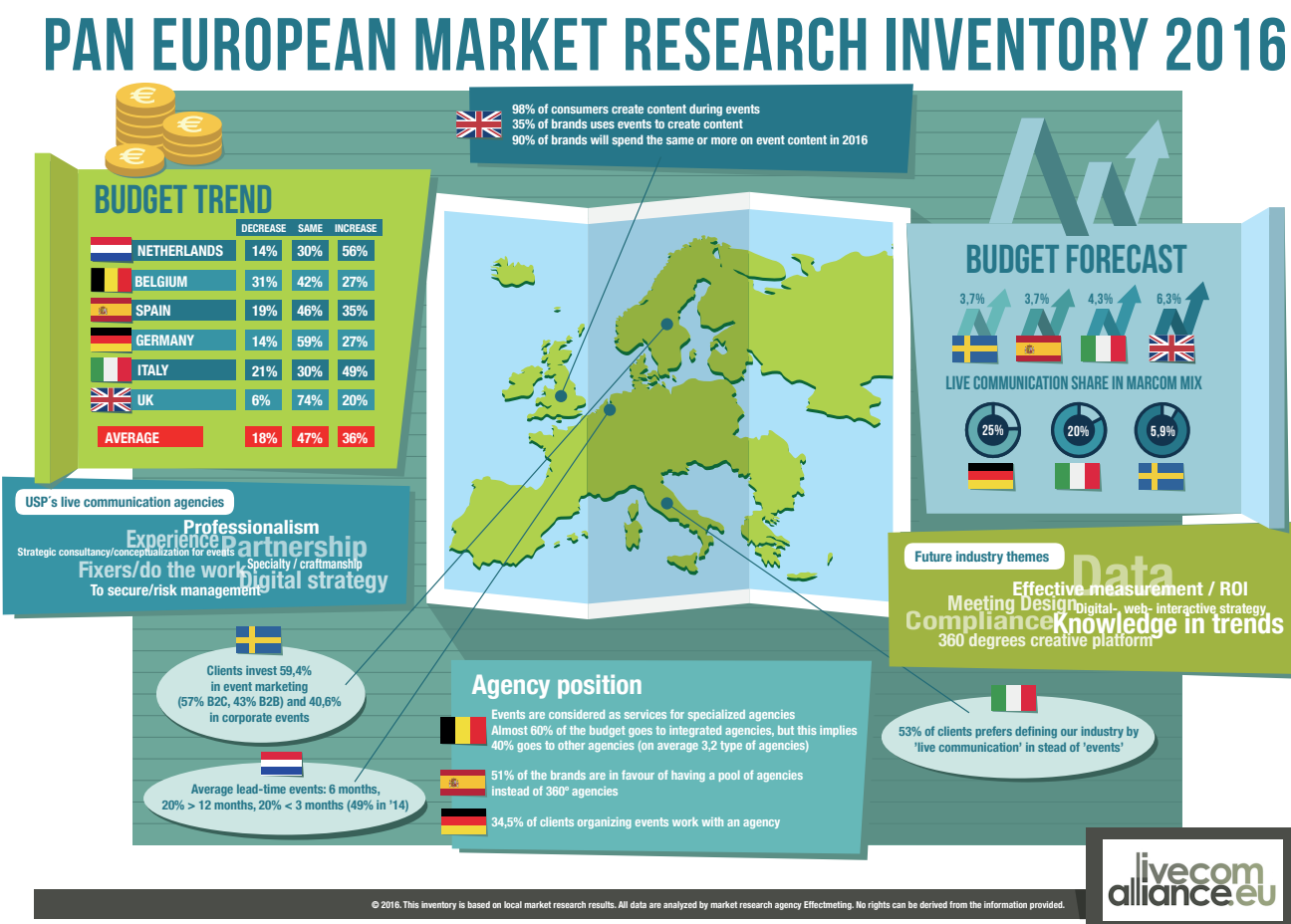
Partners



Members

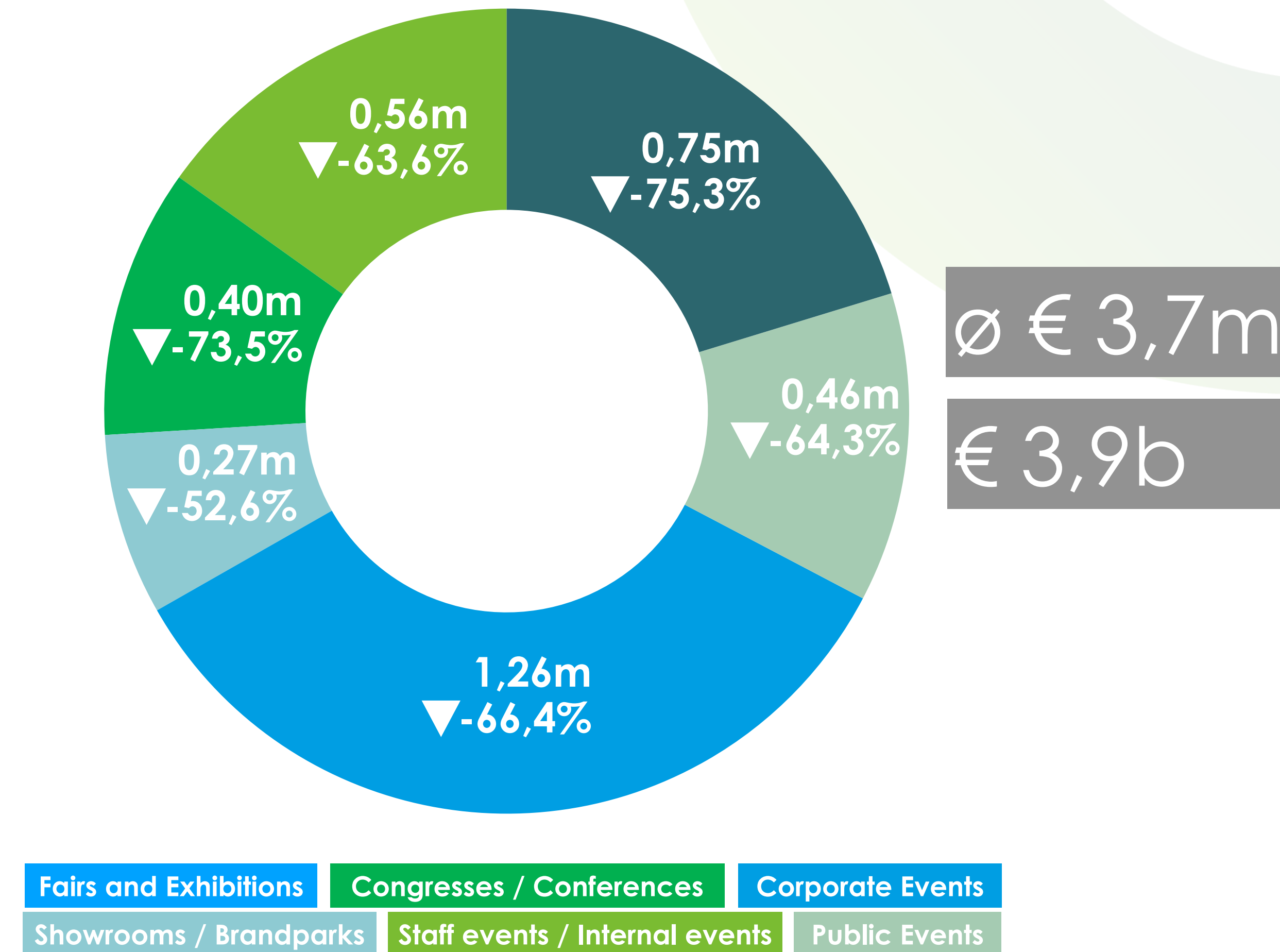
History

European Industry Survey



Sector turnover & impact covid-19

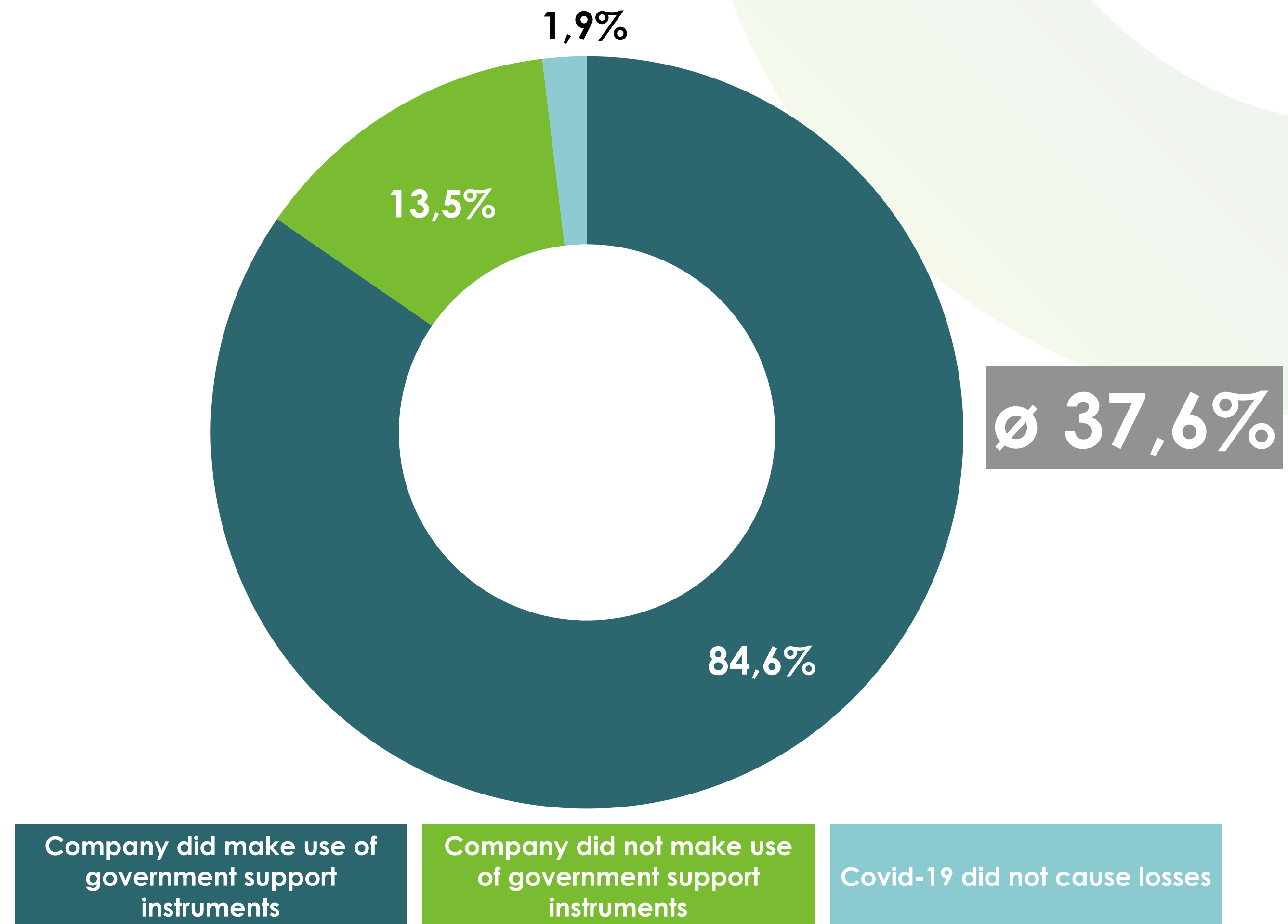
Companies' expected total turnover (€) 2020 by live communication categories – extrapolation for 1.058 member agencies of the LiveCom Alliance.



Compensation company losses vs government support instruments

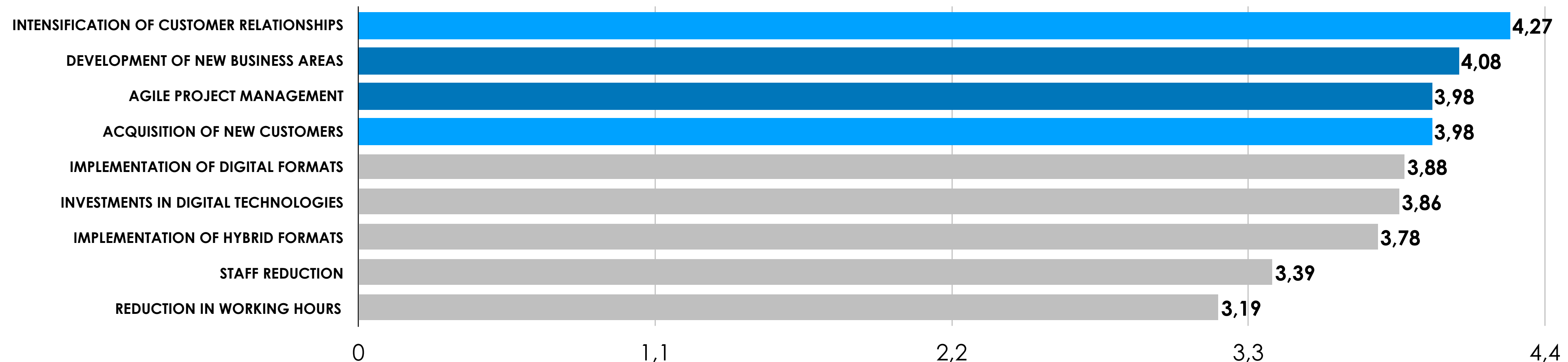
Government support facilities used
by 85% of the companies.

On average, 37,6% of the losses
were offset by state aid.



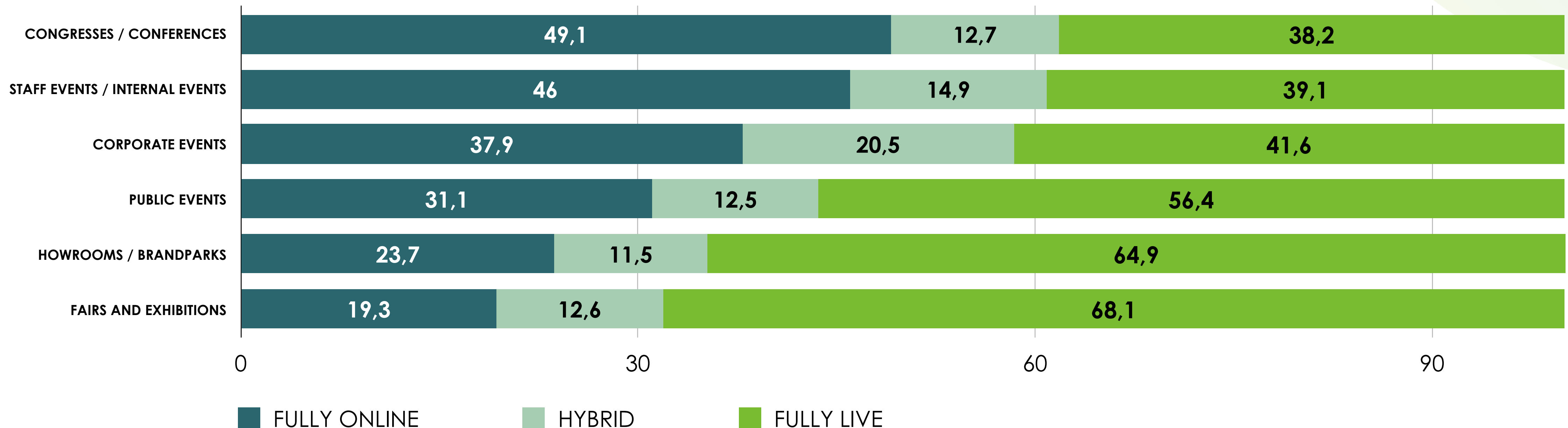
Instruments & activities to face consequences covid-19

Particularly relevant for agencies was the intensification of existing customer relationships and the development of new areas of activities, combined with acquisition of new customers.



Live communication categories - online - hybrid - fully live

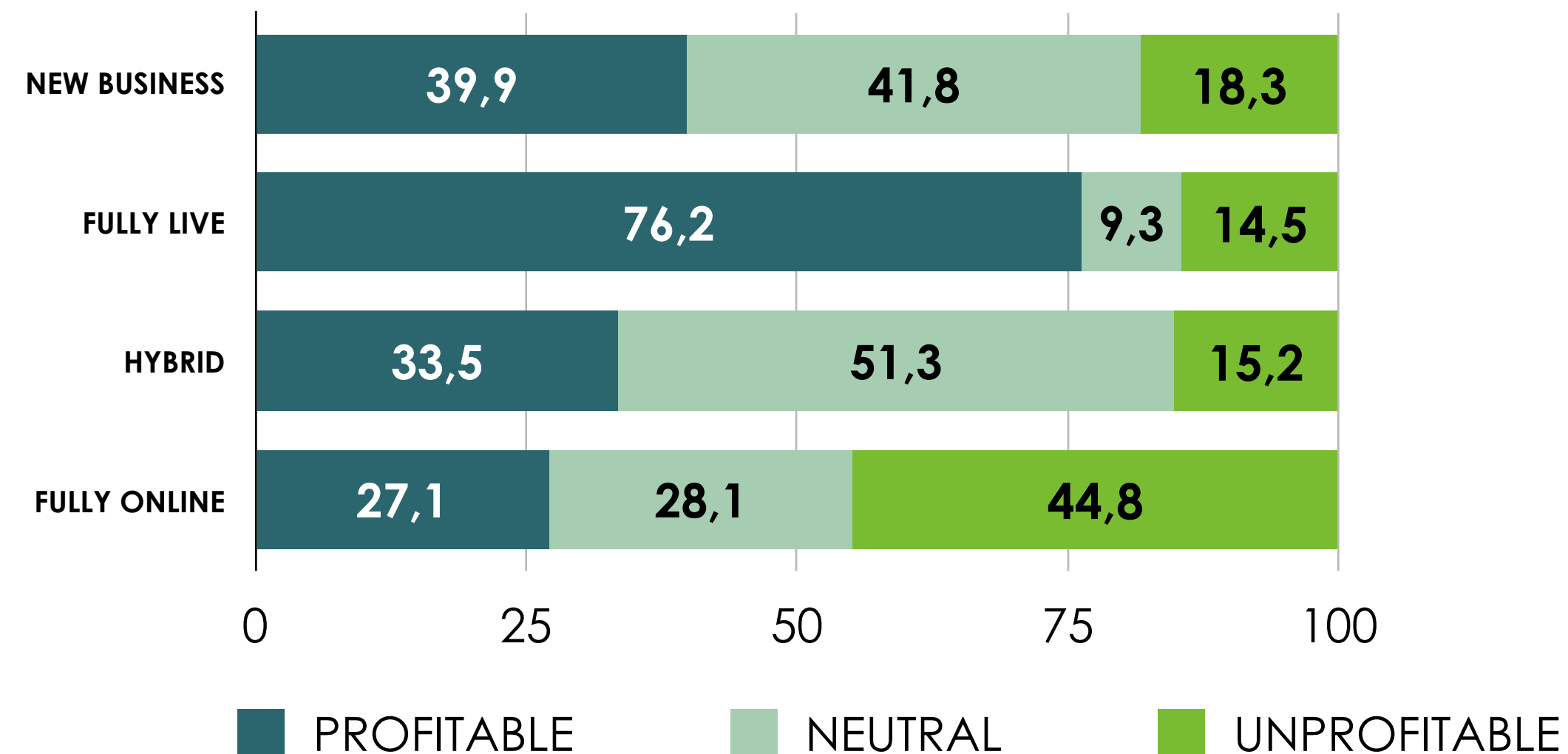
Due to the pandemic, new ways of realizing events had to be taken; big push for digital and hybrid events.



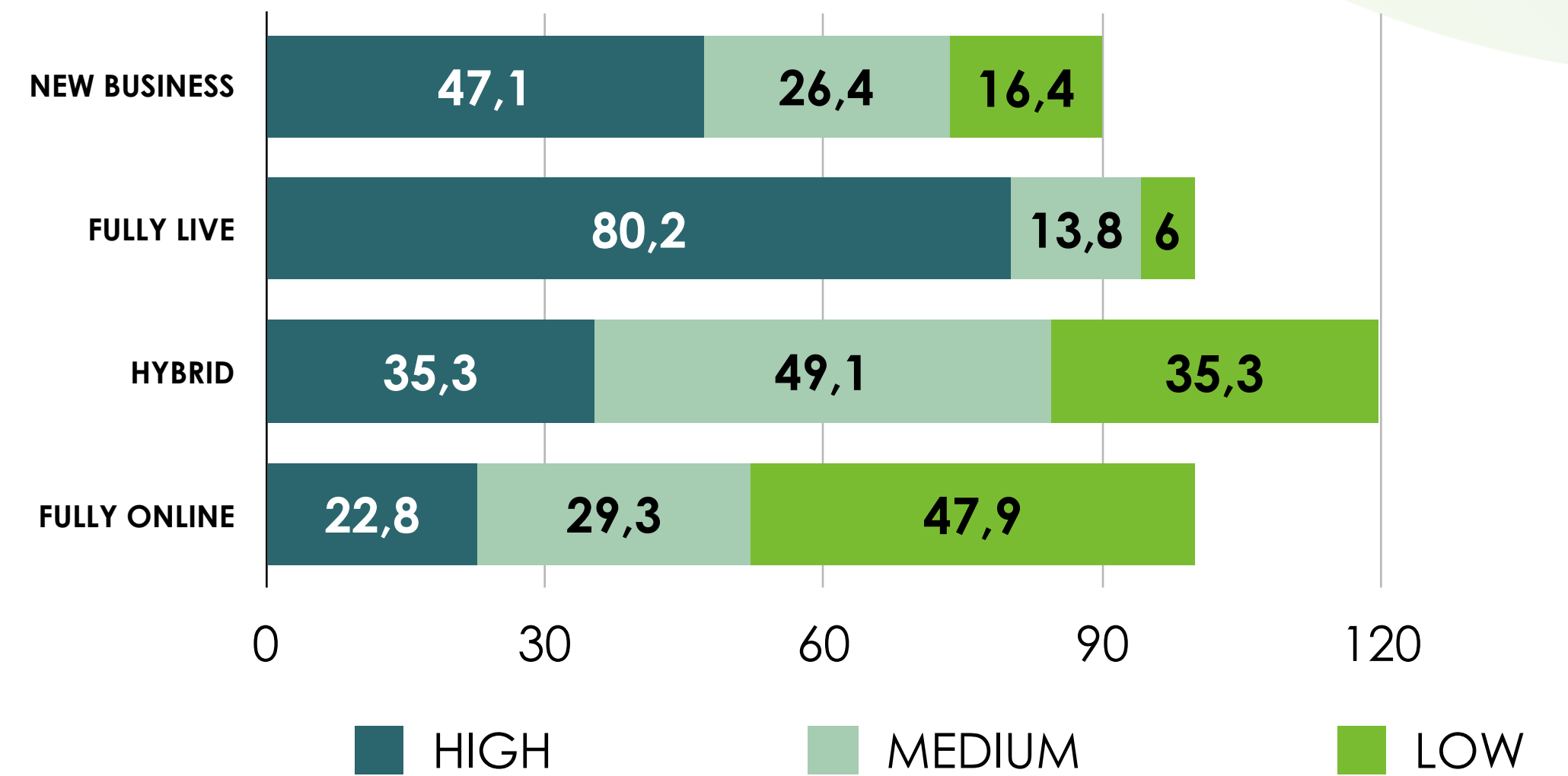
Profitability & strategic importance new business - online - hybrid - fully live

Fully live absolute winner in profitability and strategic importance, followed by new business. Hybrid shows a possible future industry driver.

Profitability



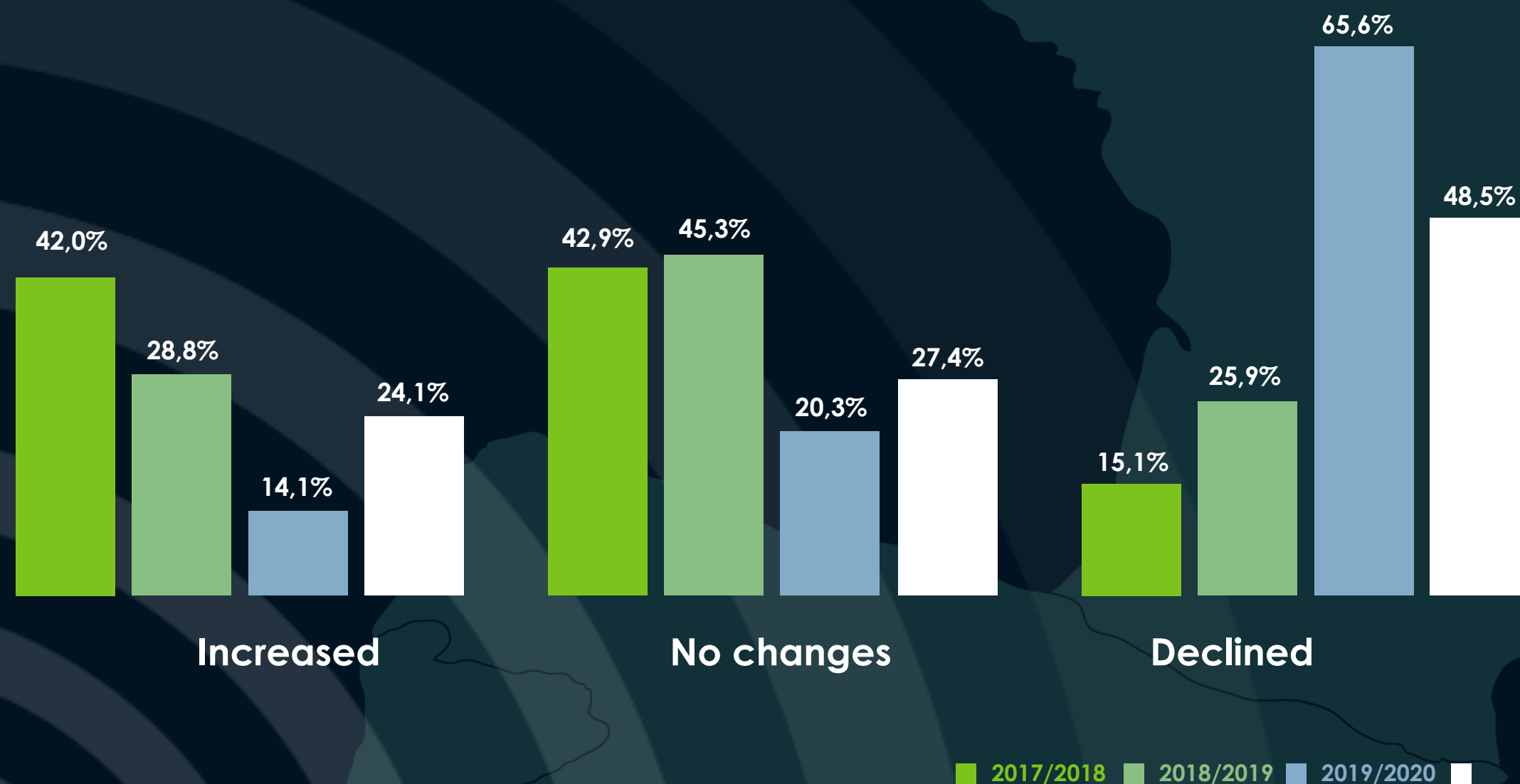
Strategic importance for companies future



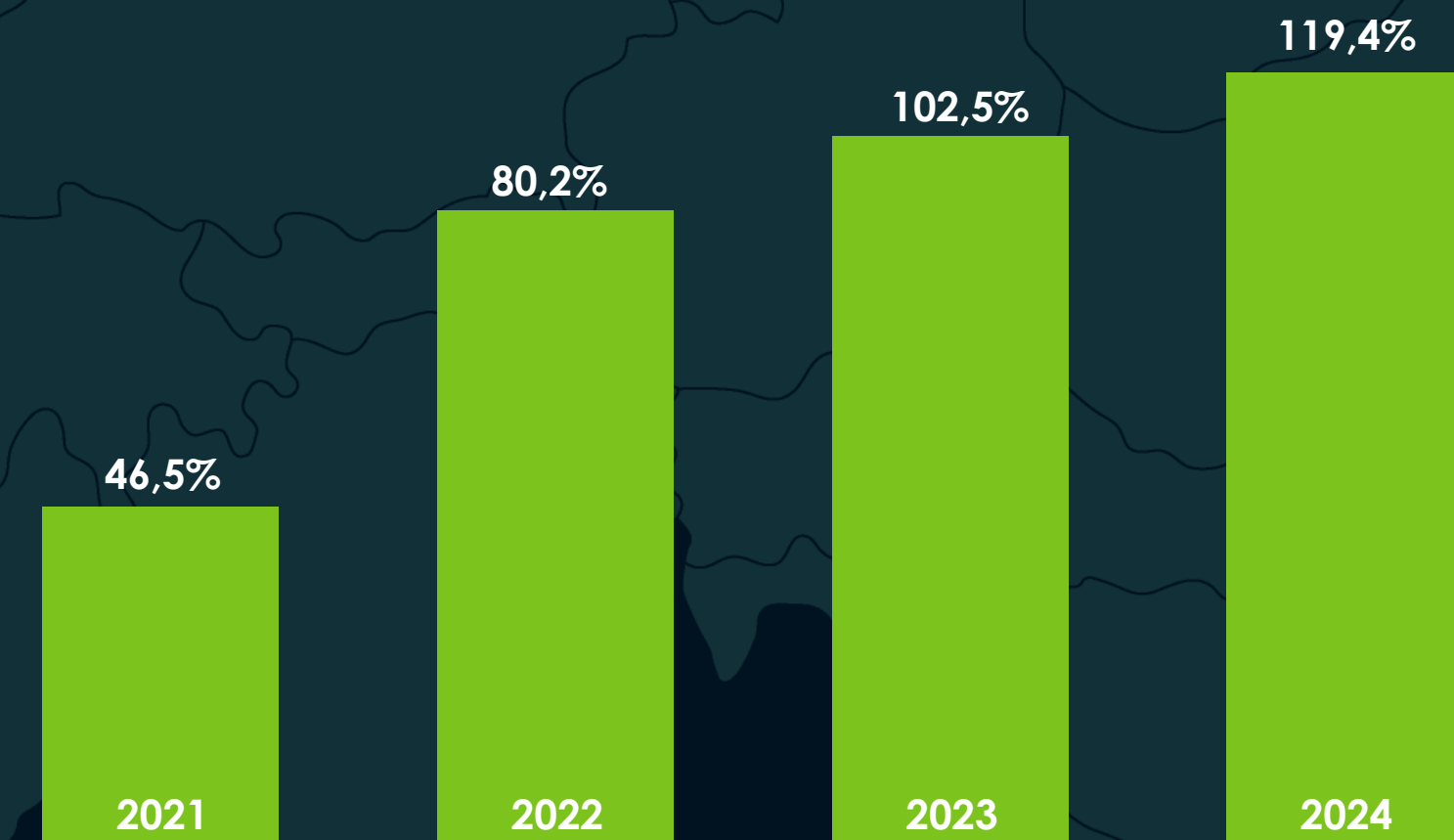
Budget trends & turnover expectations

Slight growth in '21, pre-Covid-19 turnover reached in '23.

Budget trends



Turnover expectations



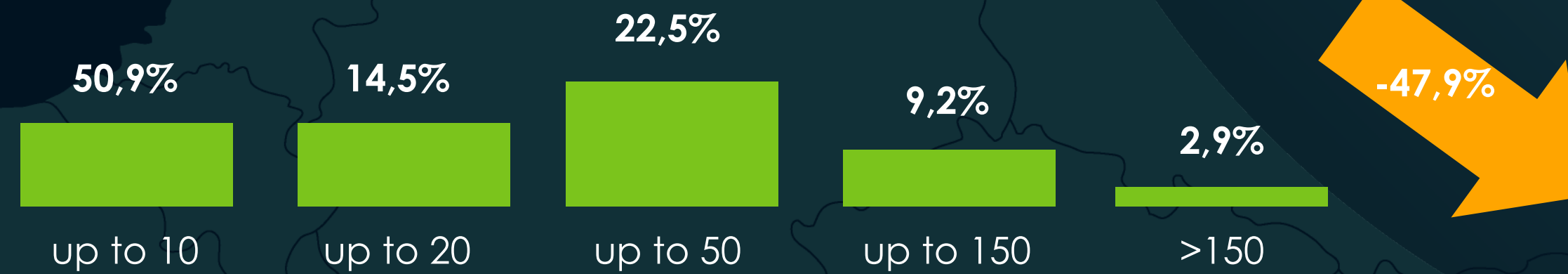
Full time & part time employees

On average, agencies employ 28,6 full-time and 7,1 part-time employees.

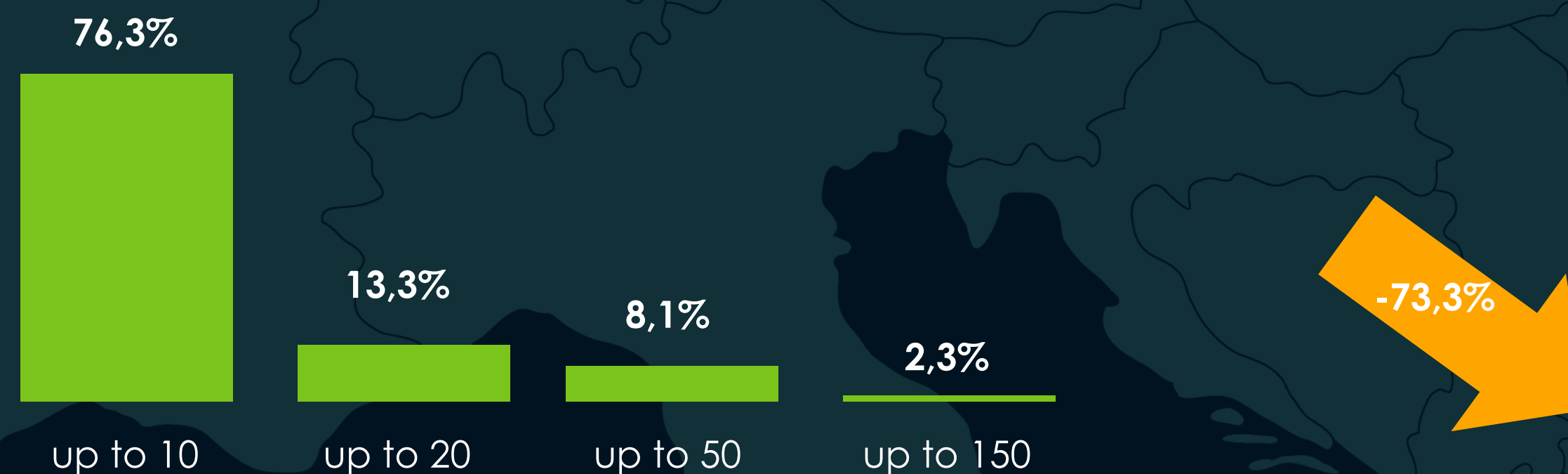
About half of the agencies employ up to 10 employees.

More than three quarters employ up to 5 part-time employees.

Full-time employees



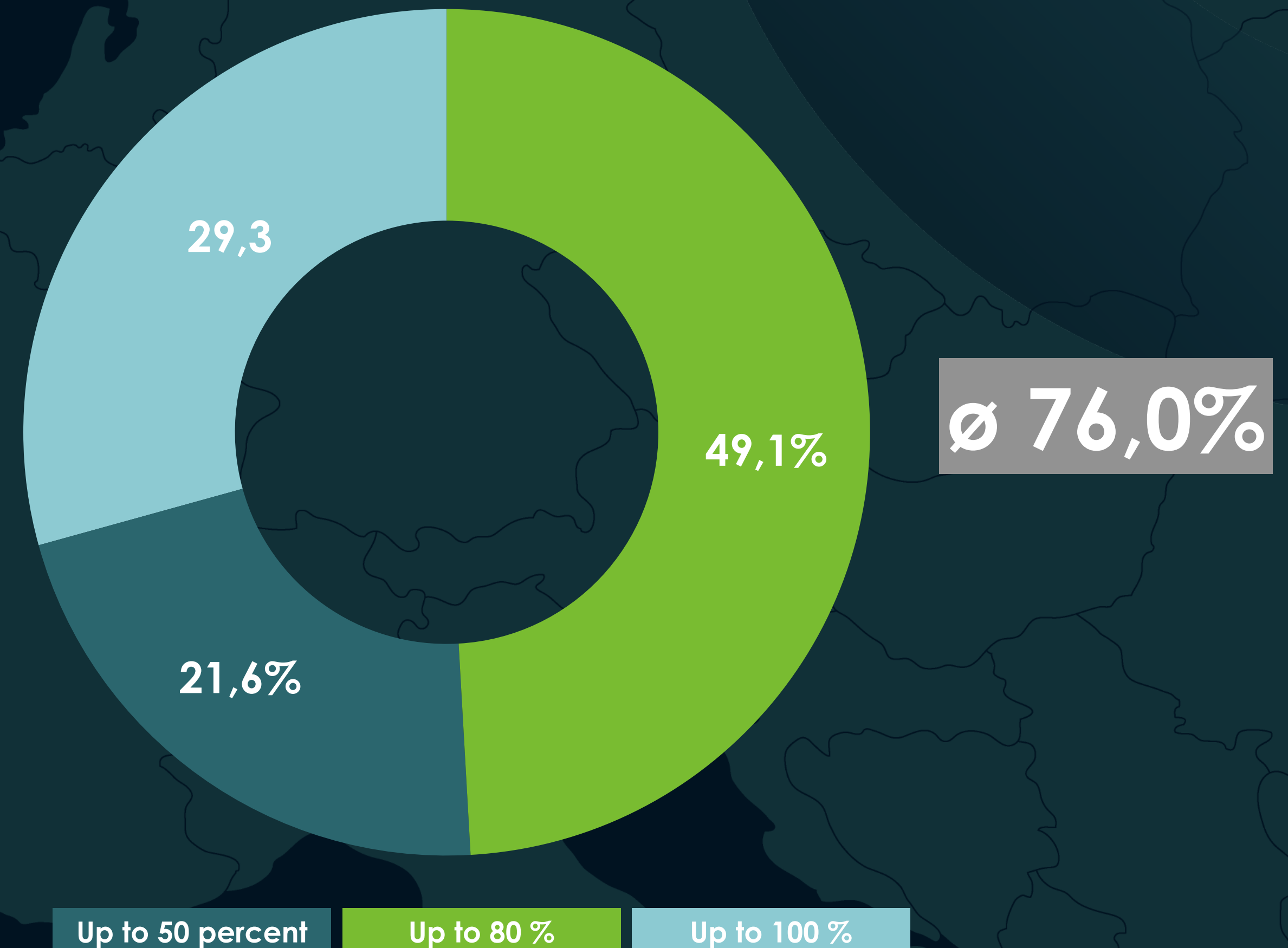
Part-time employees



Government funded short- term work

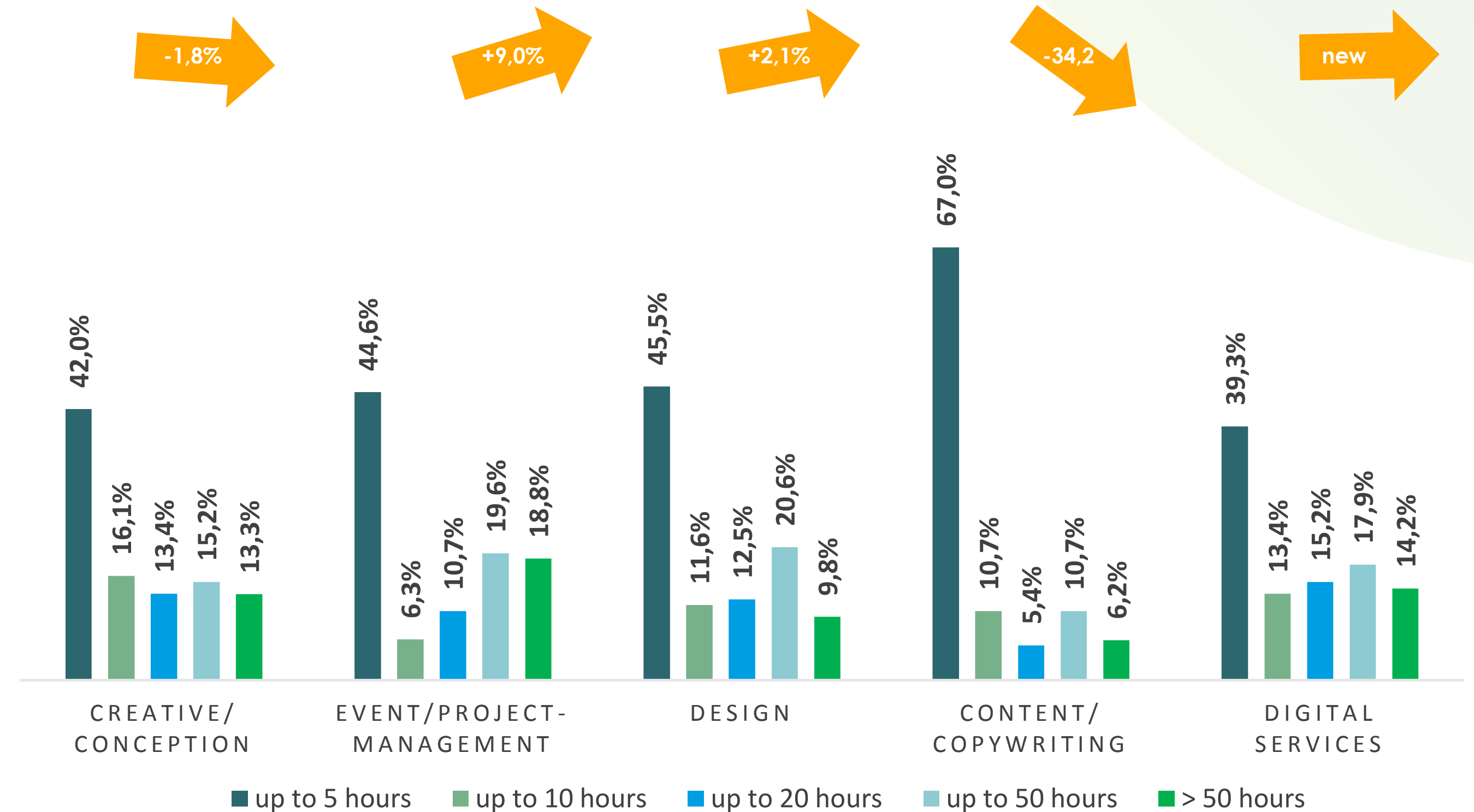
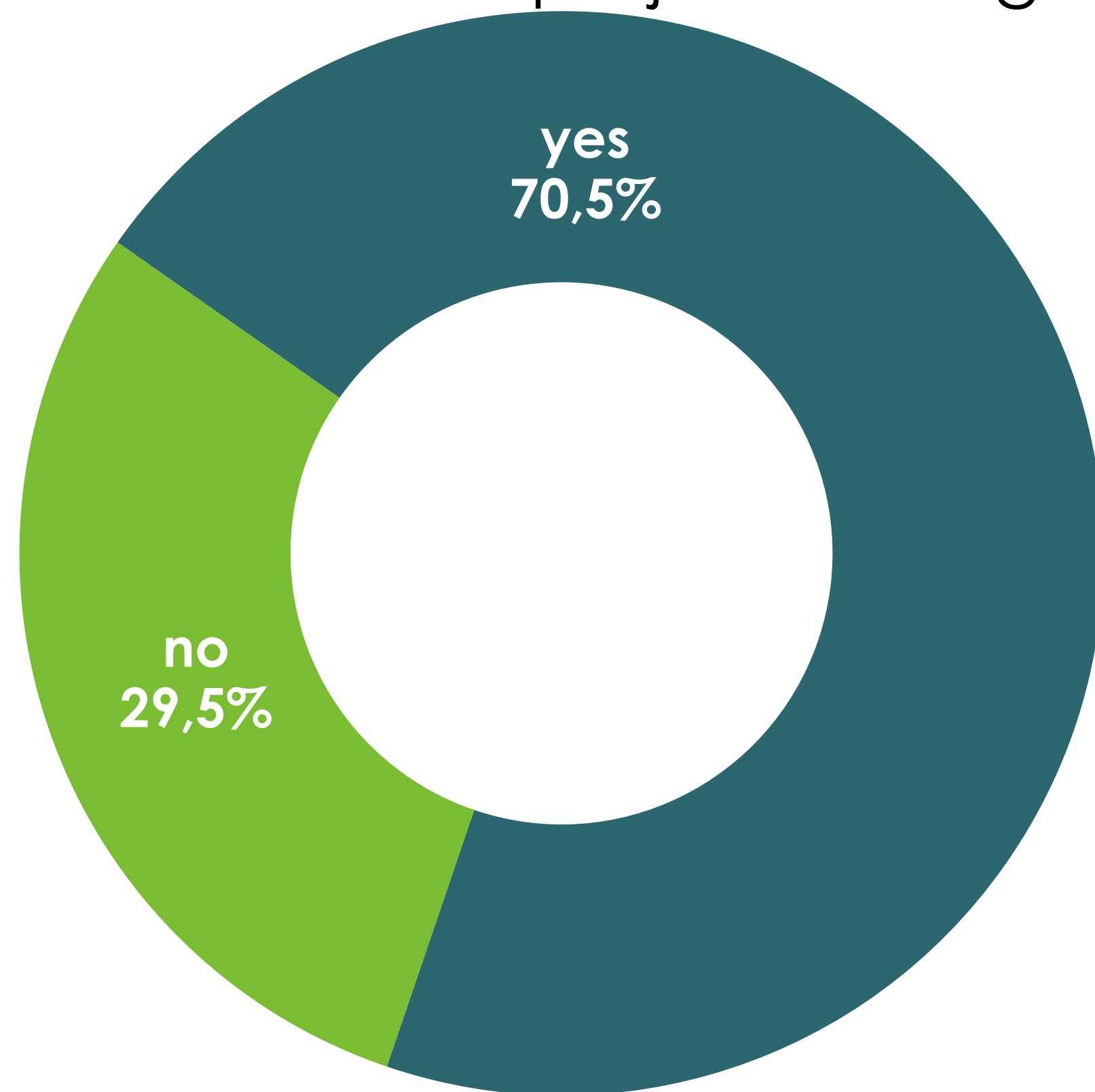
Nearly 80% of agency employees were on short-term work in 2020 at more than 50%.

On average, the share of short-time work was 76%.



Cooperation freelancers

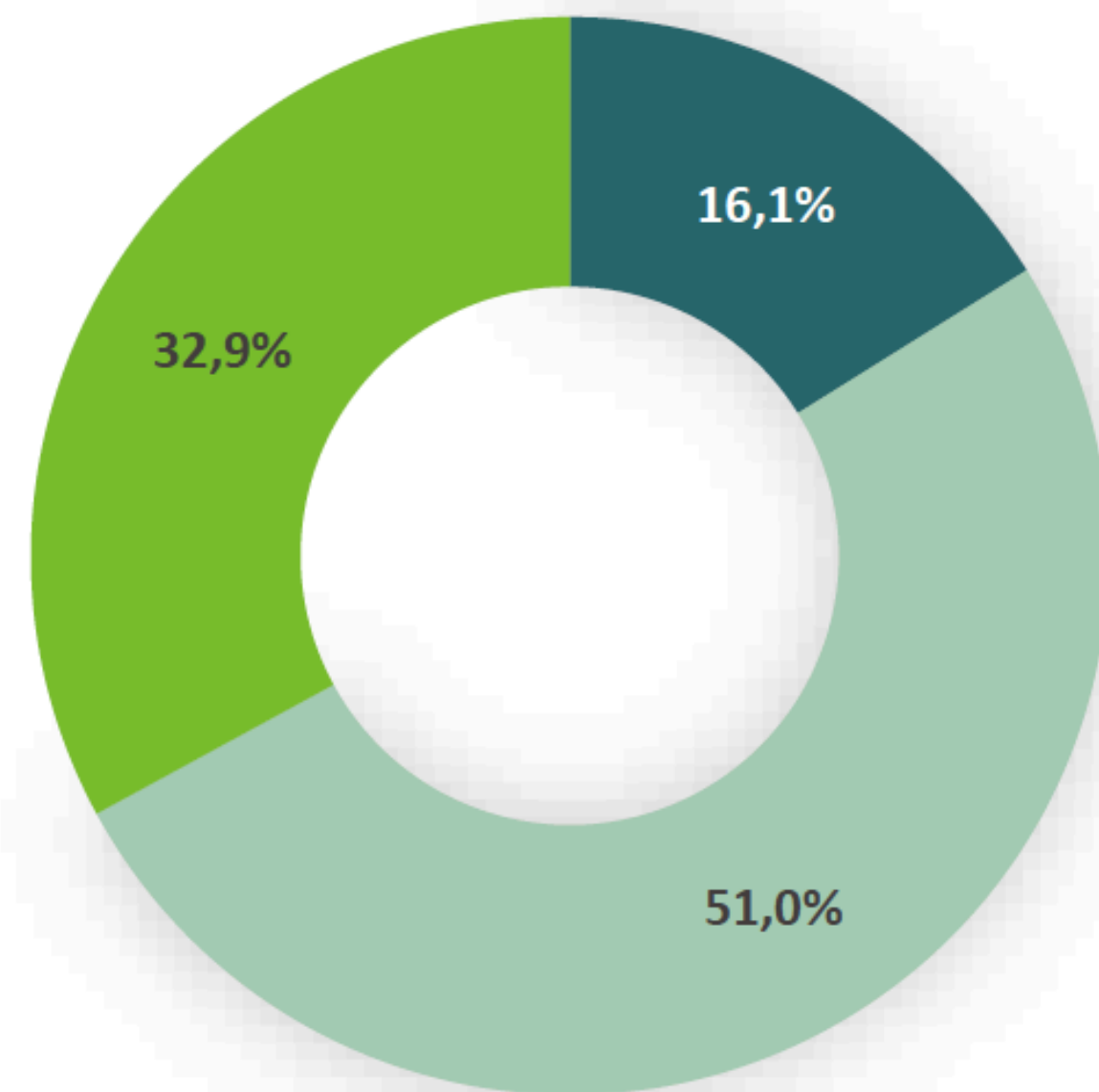
In general 70,5% works with freelancers (ø 15,8 hours/month), against 29,5% not.
Profiles event- & projectmanagement and digital services are particularly important.



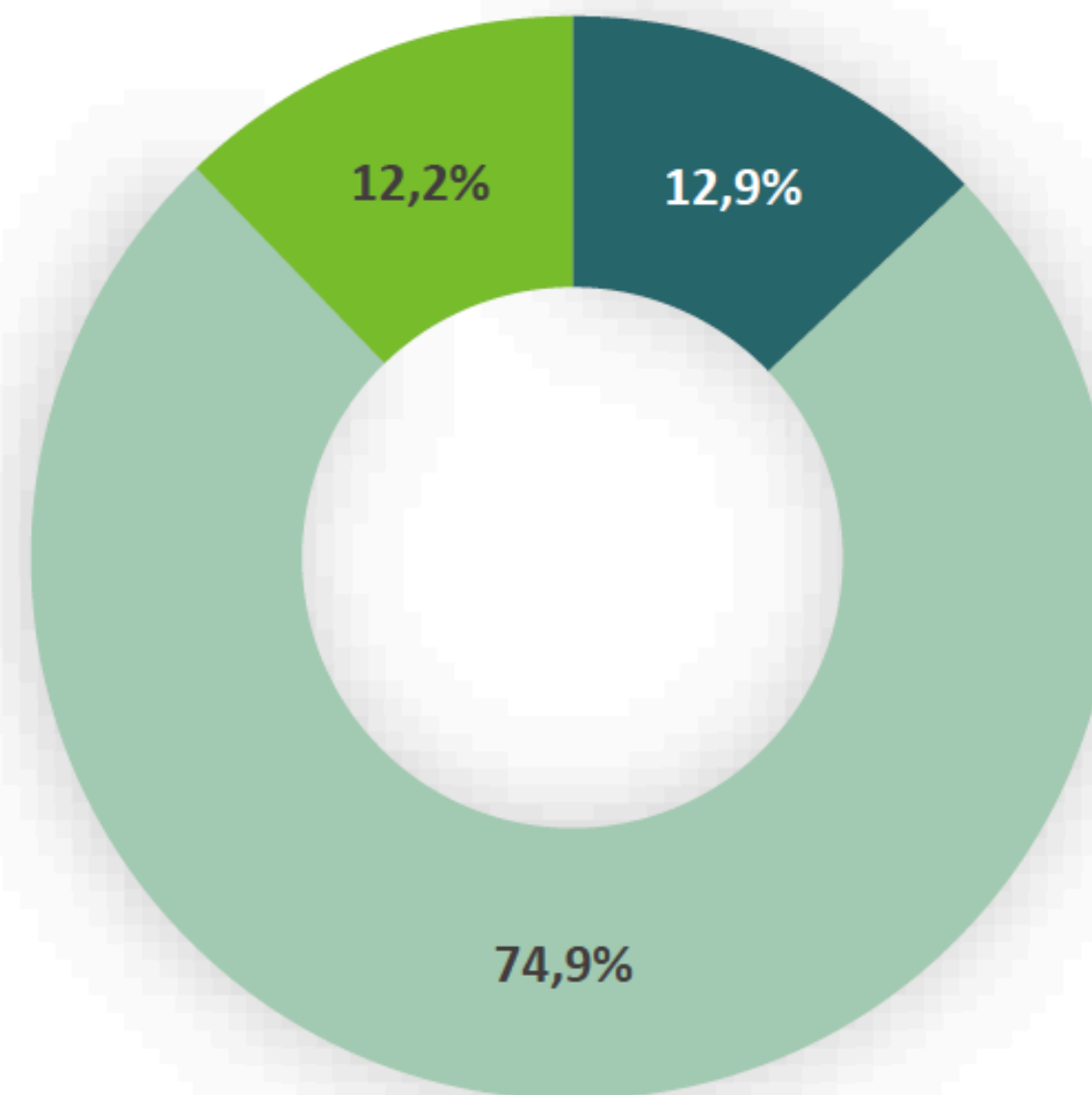
Forecast employment 2021

No change for 50 - 75% of the companies in regard to fulltime and part-time employees. Almost 30% increase freelancer hours.

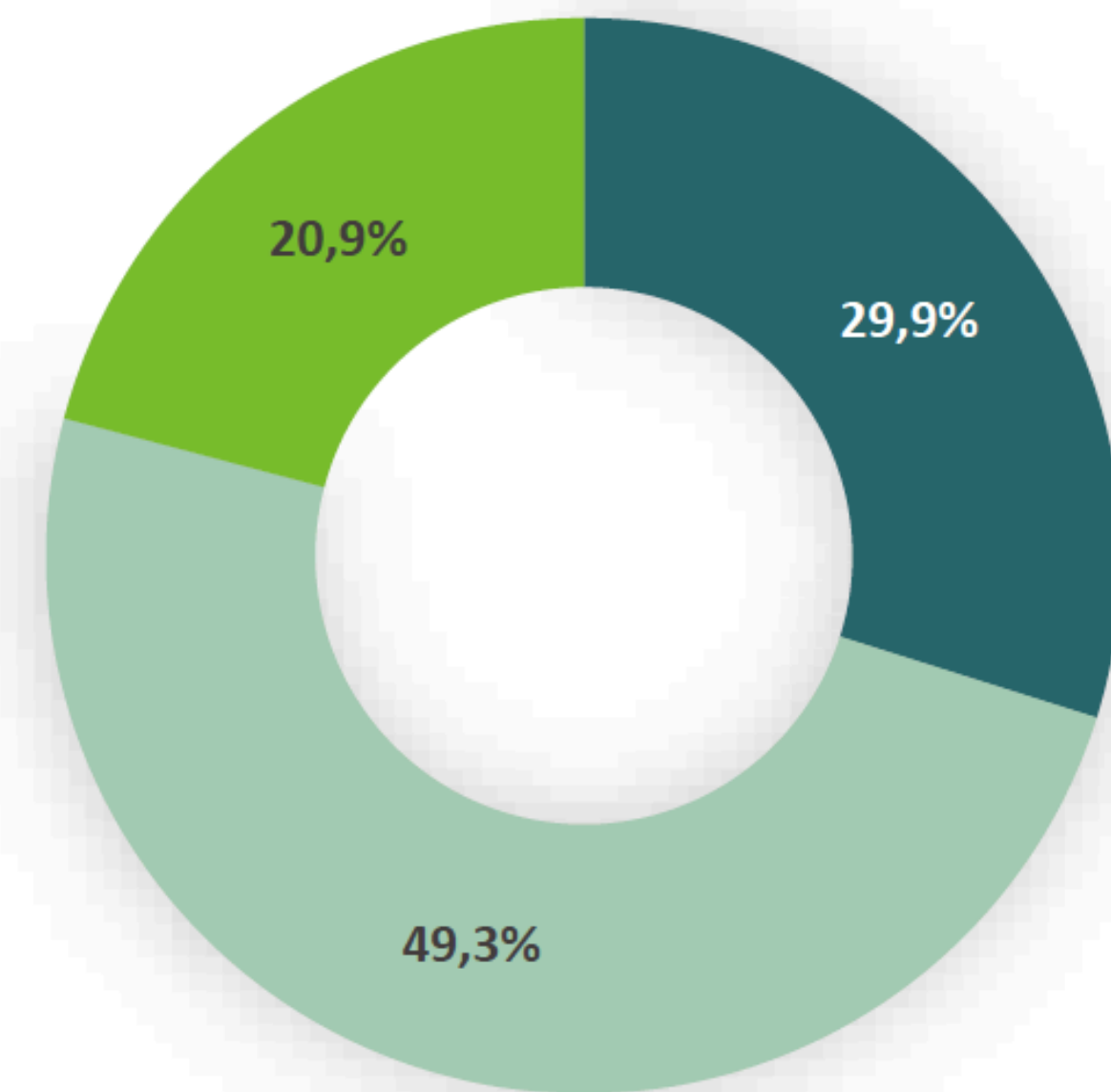
Forecast to employ in 2021
full-time employees



Forecast to employ in 2021
part-time employees



Forecast to employ in 2021
freelancer hours



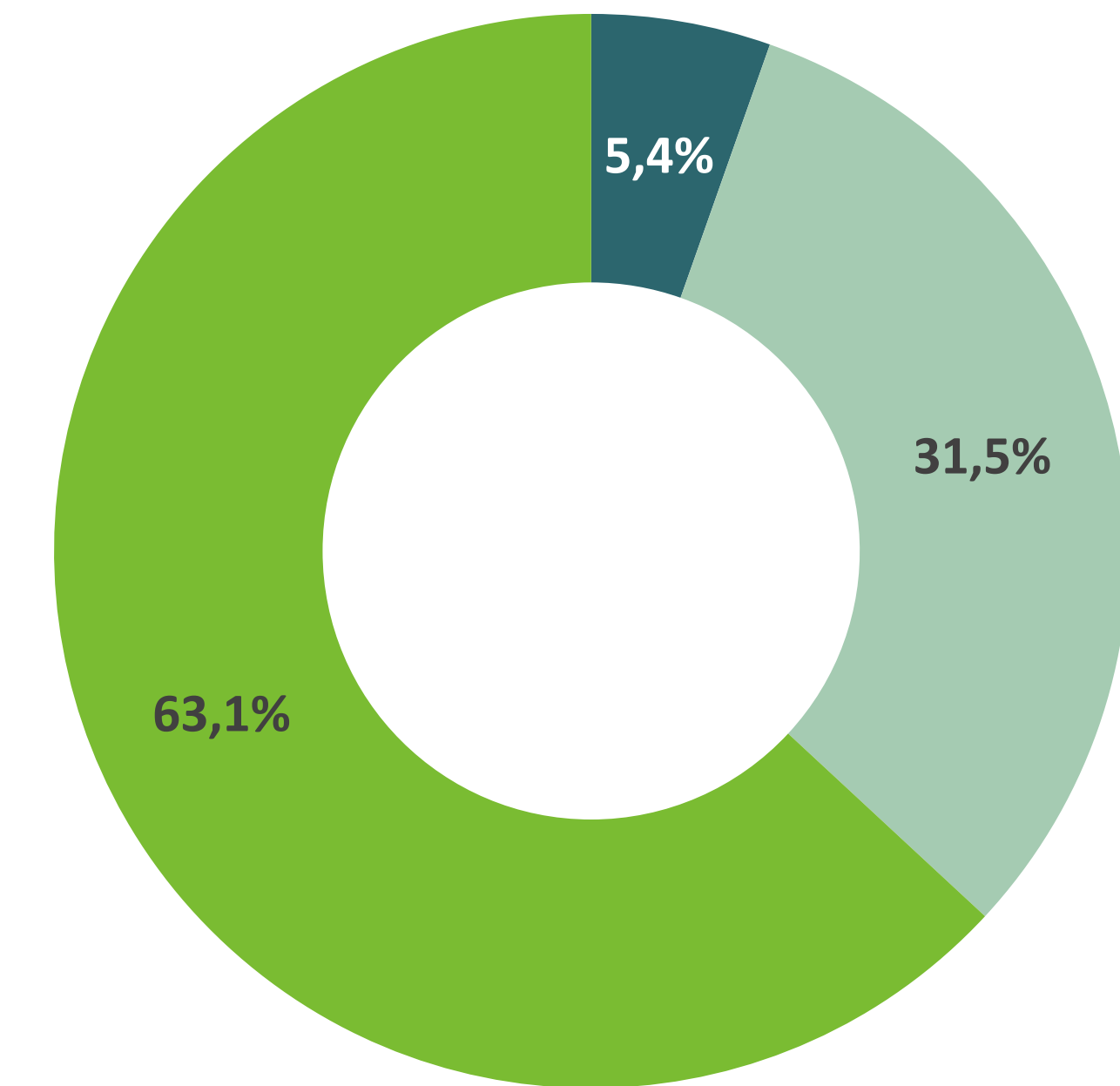
INCREASE

REDUCE

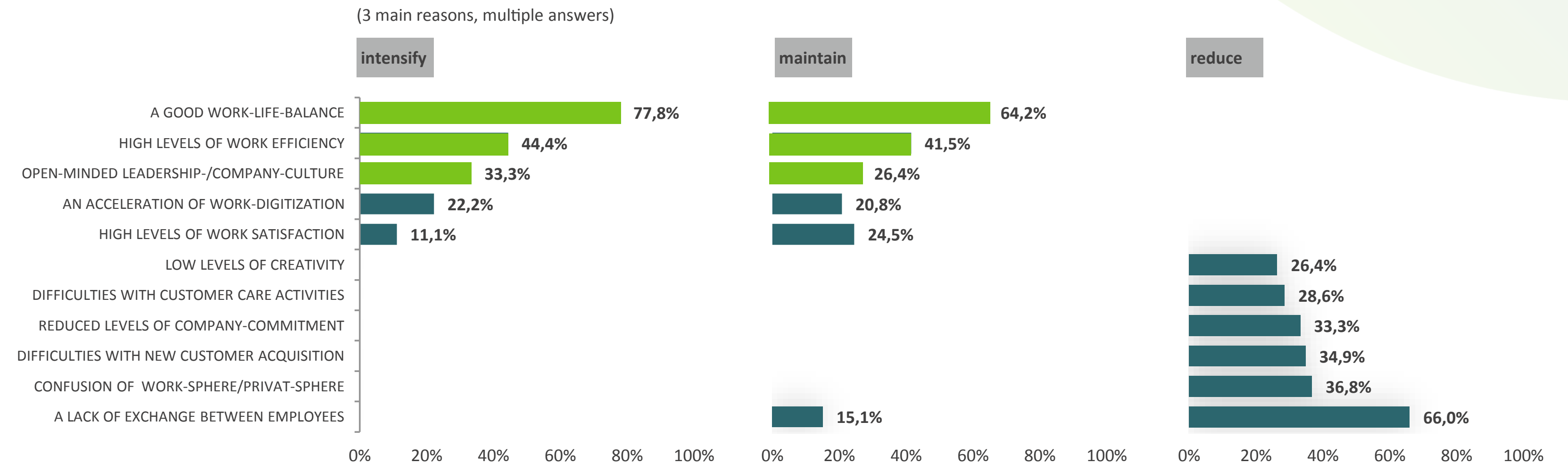
NO CHANGE

Working from home (experience) - 2020

About one third will maintain the level of working from home, against reducing two third. Lack of exchange employees main reason to reduce.

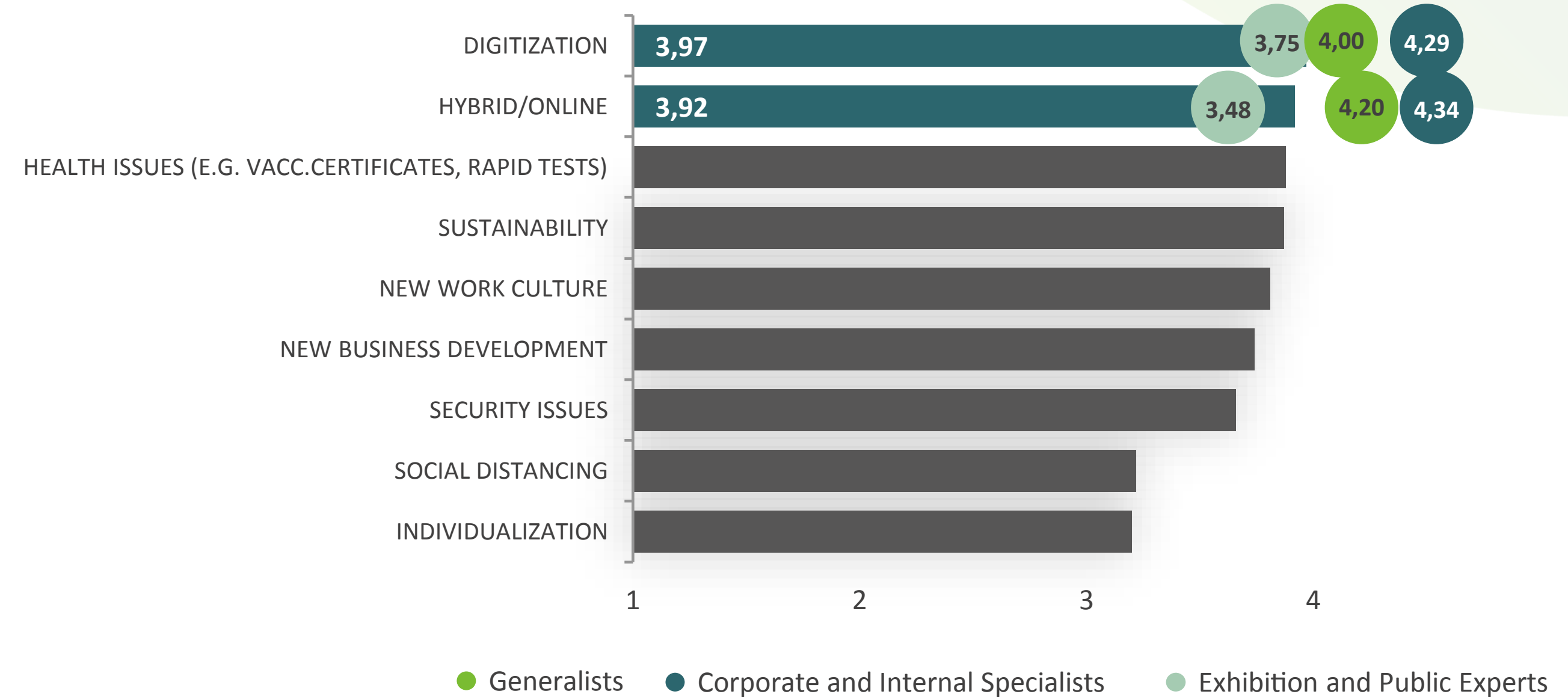
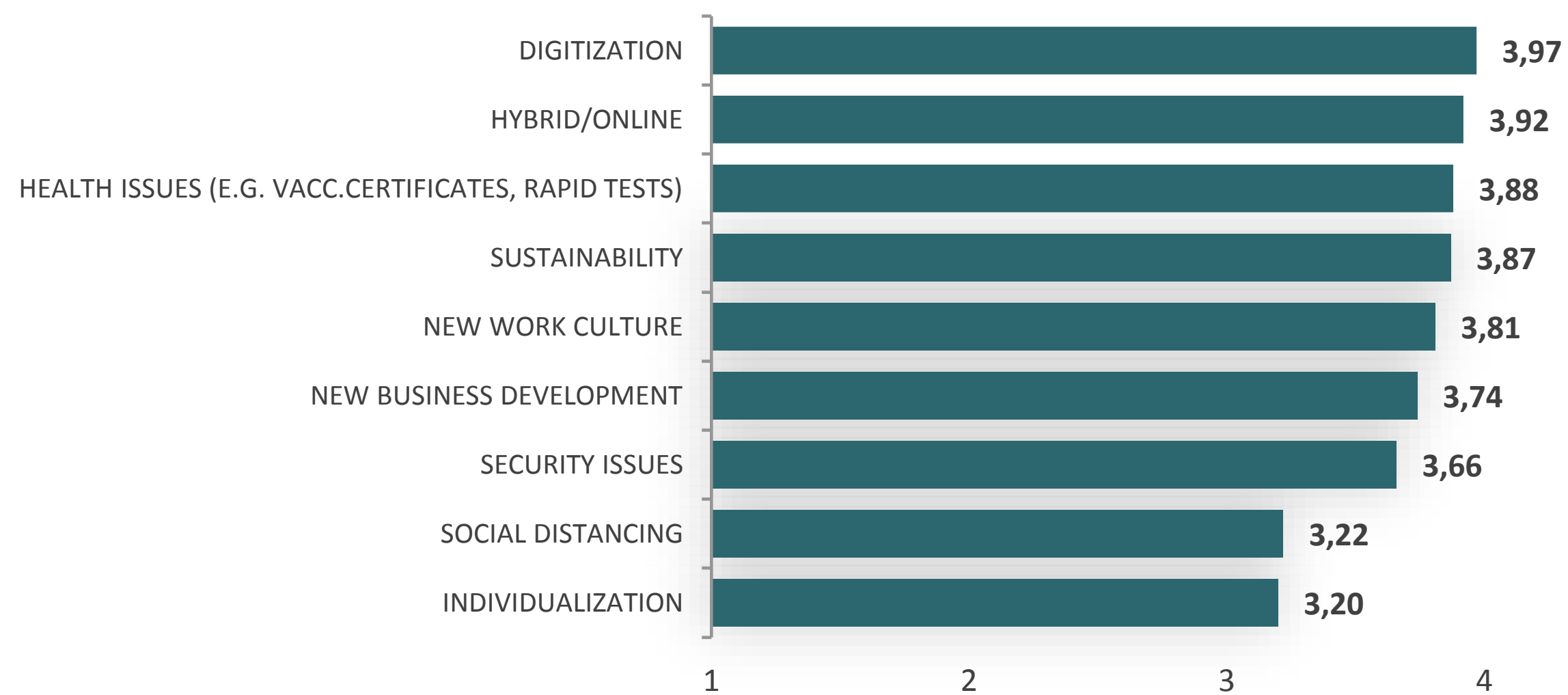


- intensify working from home
- maintain working from home intensity
- reduce working from home



Future trends

Respondents emphasize the important role of digitization and online/hybrid events. Sustainability also remains a critical future topic.



Key findings in a nutshell

livecom
all!ance.eu

1.058
Member
agencies

€ 3,9b
Sector turnover
-68,4%*

37.770
Employees
-54,5%*

70.000
Projects
-68,5%*

Digitization
Hybrid / Online
Health issues

Creativity
Digital competence
Self-Management

Trends

Challenges

*change compared to 2019



Thank you!

conducted by



European Institute for Live Communication

partner

