

PRESS RELEASE

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LiveCom Alliance European Industry Survey 2020 exposes the huge impact on businesses caused by Covid-19. It also highlights the industry's resilience during the pandemic and sets out key future challenges.

LiveCom Alliance proudly presents the fifth edition of the European Industry Survey. This year's edition was not only intended to capture the major trends, challenges and economic impact drivers of the live communication industry. The main purpose was to define a post-Covid fixing point.

Industry Survey 2020

This study, the second consecutive edition conducted by the renowned German R.I.F.E.L. Institute, systematically explores the current state of the live-communication industry across different European countries. The survey covers different themes, such as structure, characteristics, revenues and employees. This edition also addresses the abruptly disrupted playing field and the myriad of challenges faced by the industry while navigating its way through the crisis.

The results of the European Industry Survey 2020 are based on a sample of 298 companies that represent a total of 1.058 live-communication companies and agencies. All these national members are united in the twelve member associations, equivalent to member states, of LiveCom Alliance.

Industry hit hard

Respondents have an extrapolated economic impact of € 3,9b sector turnover and a workforce of 37.700 employees. Figures attest to a bruised industry; a substantial decrease in comparison to 2019 in turnover (-68.4%), projects (-68.5%) and employment (-54.5%).

Obviously, it was challenging to get through these unprecedented times and the industry gratefully leaned on the government-support: 85% of the companies made use of support instruments provided. On average, 37.6% of the losses were offset by state aid. As far as industry employment goes: 76% government-funded short-time-work and 50% working from home-rate. Moreover, the compensation rate of government support instruments increased to 37.6%.

Digitization and agility

Compared to 2019, we see shifts in the share and activity profiles of the member clusters (generalists, corporate & internal specialists and exhibition & public experts). The activity focus is blurring against the backdrop of the pandemic. Besides these shifts in activities, the sector has invested heavily in the intensification of customer relationships, the implementation of digital formats and managerial agility. These features are the key instruments to face the adverse effects of Covid-19.

Key challenges

The industry survey of 2020 is not only a comparison to 2019, but also a preparation for a restart of our industry, the reopening of events, and to show which challenges the sector will face now and in the near future. Only to come back stronger. The industry showed resilience, creativity, entrepreneurship and created opportunities.

When it comes to the trends that will remain relevant even after the Covid-19 pandemic has been overcome, respondents emphasize the important roles of digitization and online/hybrid event formats. According to the respondents, health aspects and sustainability also remain important as critical topics in the future.

Looking to the future, creativity, digital competence and self-management competence are perceived to be the most important individual skills to master future demands within the live-communication industry. Most of the agencies find their employees well-equipped for the key challenges of the future, however, perceive gaps in their employees' skills. This is not only in the area of digitalization, but also in the area of 'new working' (new thinking, digital culture and being open-minded). Besides, flexibility or home-based work efficiency are important areas of competence that should be developed.

The survey showcases the dramatic impact that Covid-19 had on the live-communication industry. Turnover, projects and employment were most heavily impacted. Respondents display resilience while facing challenges that the reignition of the industry will bring, where the most important drivers are identified as: digitalization and online/hybrid event formats. While on the verge of re-opening the industry, respondents will rely heavily on creative, digital and self-management competence when it comes to their teams. These skills are perceived to contribute most when kick-starting the eagerly awaited comeback of meeting each other face-to-face.

Full report

The full report published by LCA in conjunction with R.I.F.E.L. Institute offers valuable insights and concrete data that benchmark 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 complete report is available 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 2020 edition is a fifth 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 second 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 12 national organizations and affecting 1058 leading agencies and companies around Europe.

Note to editors, not for publication

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Disclaimer

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Enclosed

Infographic LiveCom Alliance European Industry Survey 2020