

LIVECOM ALLIANCE EUROPEAN INDUSTRY SURVEY 2025

'Unlocking international growth in live communication'

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

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

**European Institute for
Live Communication**

EUROPEAN INDUSTRY SURVEY

Unlocking international growth in live communication

The fourth edition of the LiveCom Survey, conducted in 2025, marks a methodological and thematic development of the ongoing research initiative by LiveCom Alliance and the R.I.F.E.L. Institute. While previous surveys focused primarily on quantitative industry indicators—such as revenues, workforce size, and budget volumes—this year's study shifts towards a more strategic and content-oriented perspective. The central theme of the 2025 edition is internationalization within the live communication industry.

The study examines the role of internationalization as a driver of growth and transformation for companies and the sector as a whole. It investigates both perceived opportunities—such as access to new markets, diversification of revenue streams, and global talent acquisition—and the challenges involved, including regulatory complexities, cultural differences, and logistical constraints. In addition to capturing attitudes and strategic intentions, the study explores concrete experiences and best practices in managing international operations. The objective is to provide a comprehensive overview of how internationalization is currently understood and approached across the industry.

This presentation summarizes the key findings of the survey and offers insights that may inform strategic decision-making, industry benchmarking, and future research. The data was collected across multiple European markets to ensure a broad industry perspective.

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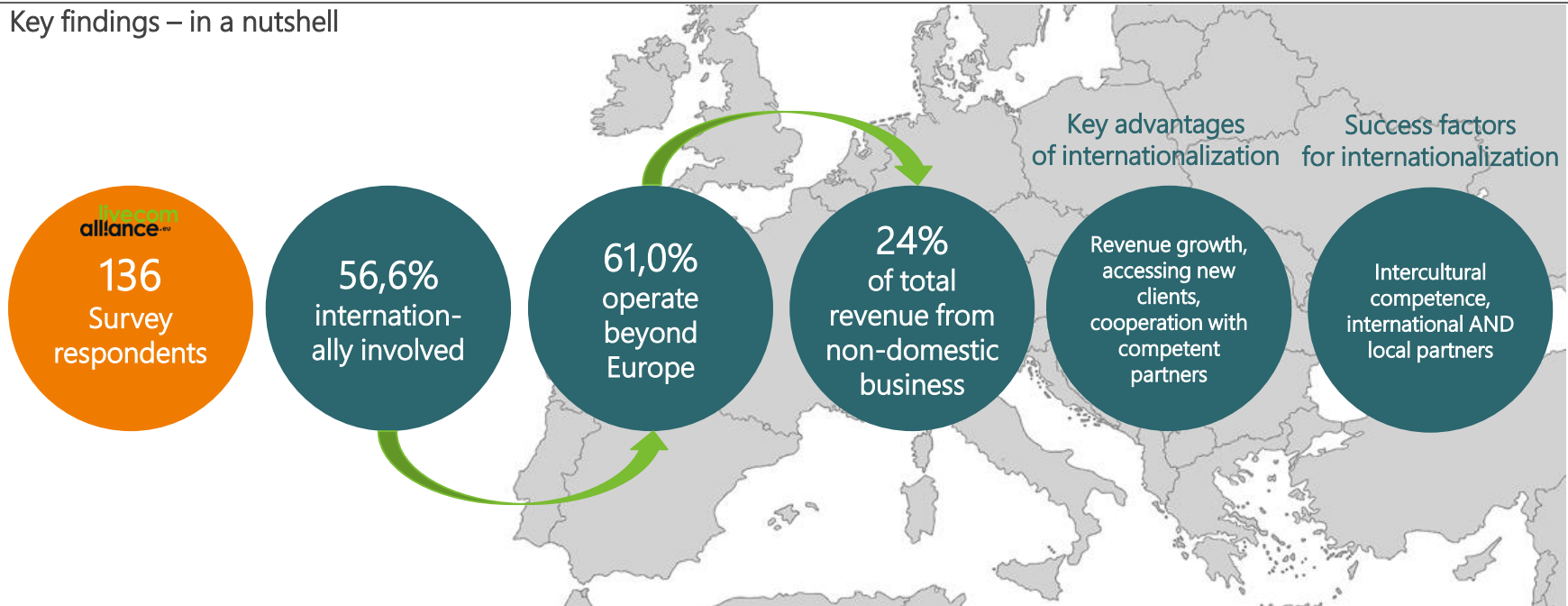
1 Key findings



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Key findings – in a nutshell



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- A total number of 136 companies (97 Organizers / Agencies and 39 Suppliers) from 7 European countries participated in the LiveCom Alliance Study 2025.
- Overall, the study provides an interesting overview of the development of internationalization in the LiveCom industry. More than half (56,6%) of the companies surveyed are internationally involved (54,6% of the Organizers /Agencies and 61,5% of the Suppliers). 16,7% of the companies that are currently not internationally involved have plans for internationalization.
- 39% of the surveyed companies operate in Europe only. 61% of the companies operate in Europe and other global regions such as Near/Middle East, Asia/Pacific or North America.
- Companies involved in international business appreciate the importance of internationalization for the live communication industry in general with 3,5 (Scale: min. 1 - max. 5). Compared to companies without internationalization plans that provide an average assessment of 2,7, this reflects a significantly higher perception of the relevance of this specific business aspect.

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- Revenue growth, accessing new clients and target groups as well as risk diversification are the three top advantages of operating internationally.
- High set up costs, regulatory or legal barriers and cultural challenges are the main barriers of operating internationally.
- The success factors for international operations in the live communication sector are personal intercultural competences of employees, international and local partnerships.
- It is interesting that companies that do not operate internationally believe completely different factors to be crucial for internationalization, i.e. innovative products, local market adoption and legal expertise in foreign markets. The LiveCom Alliance should therefore promote the exchange of information and experience between the European companies.

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2 Study design



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Targeted companies:	Members of Live Communication associations in six European countries
Method:	Online survey
Field time:	Spring 2025
Sample:	136 companies (97 Organizers / Agencies and 39 Suppliers)
Implementation:	LiveCom Alliance in cooperation with the R.I.F.E.L. institute

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LiveCom Alliance – involved member associations



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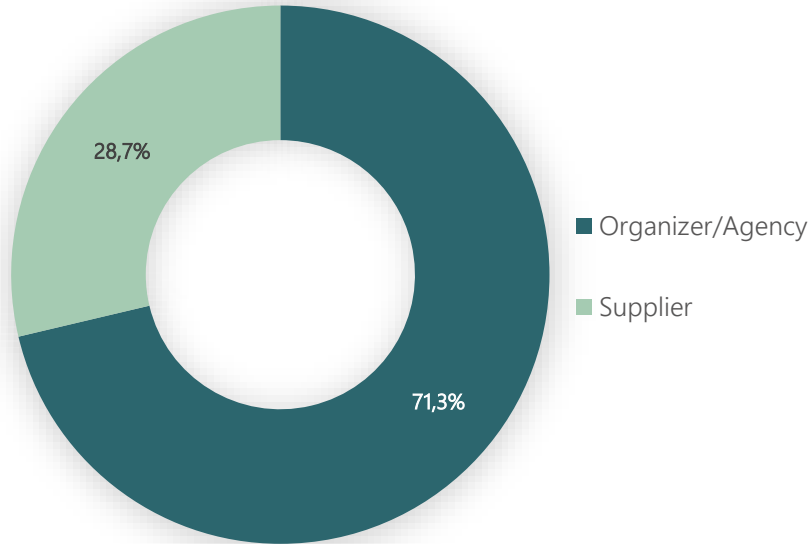
3 General overview of the sample



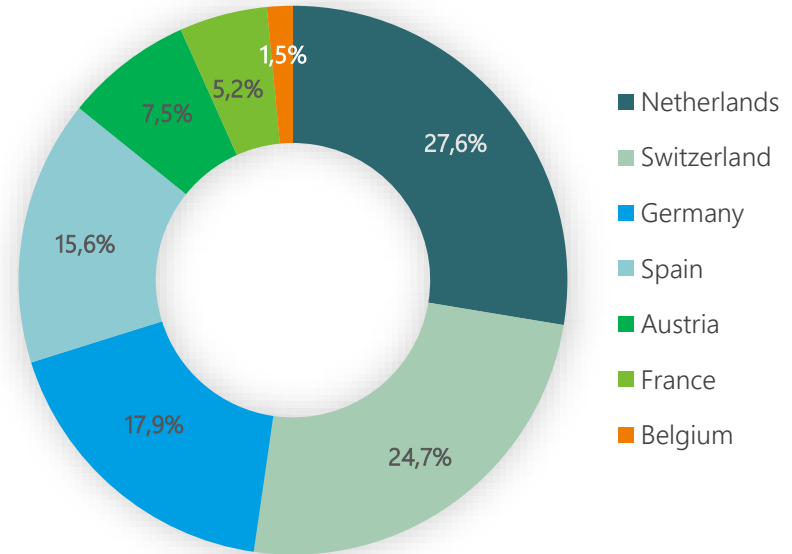
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Based on the services that companies offer –
what describes your company best?



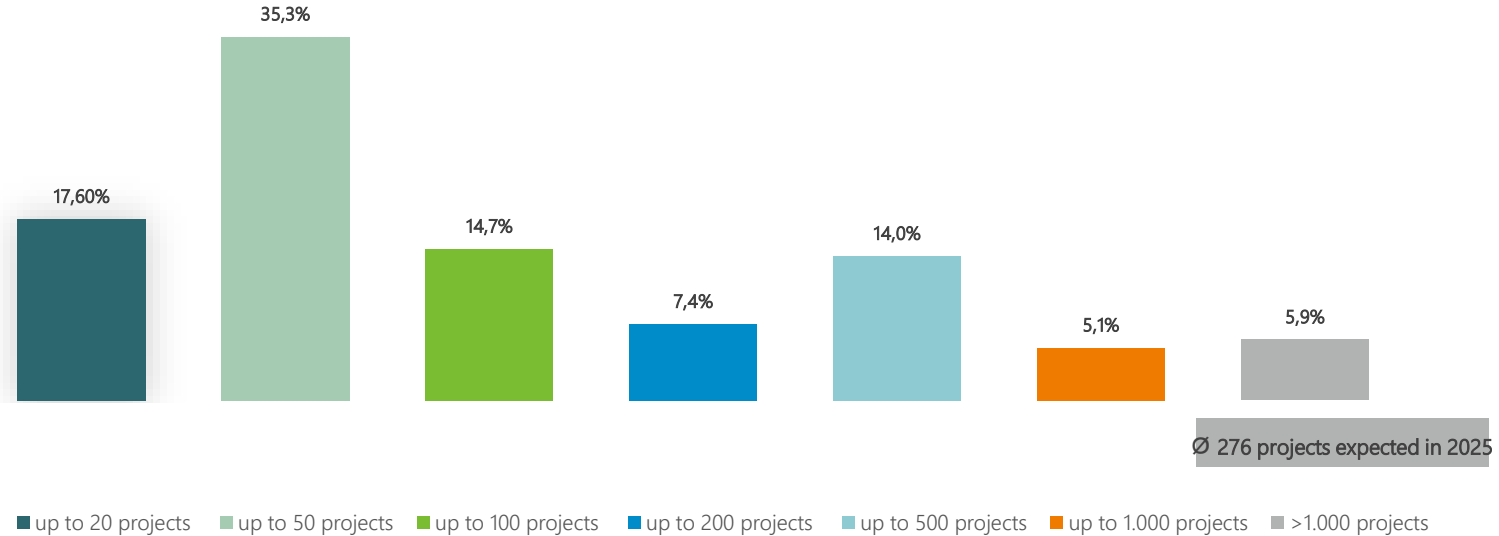
Where is your headquarter located?



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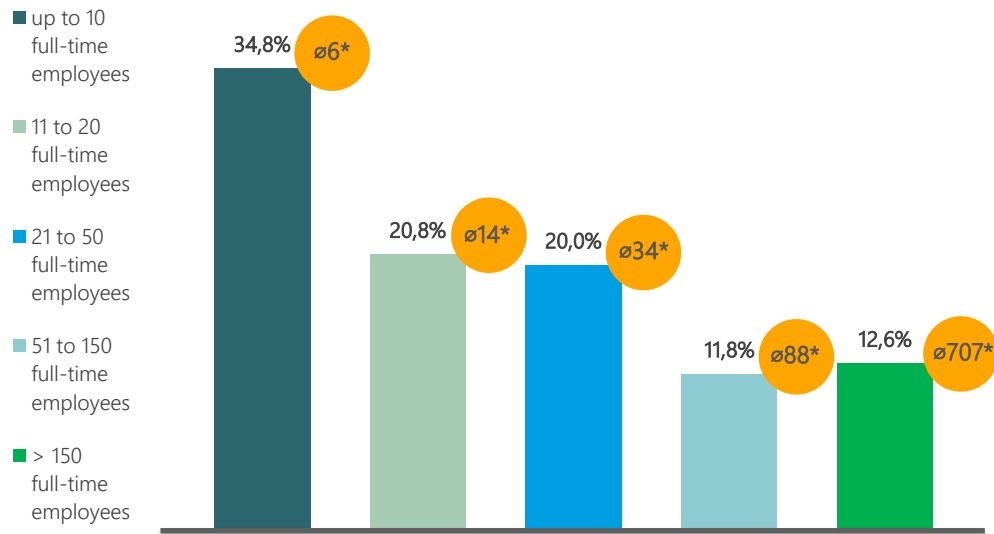
How many projects does your company handle each year?



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Share of companies by number of employees



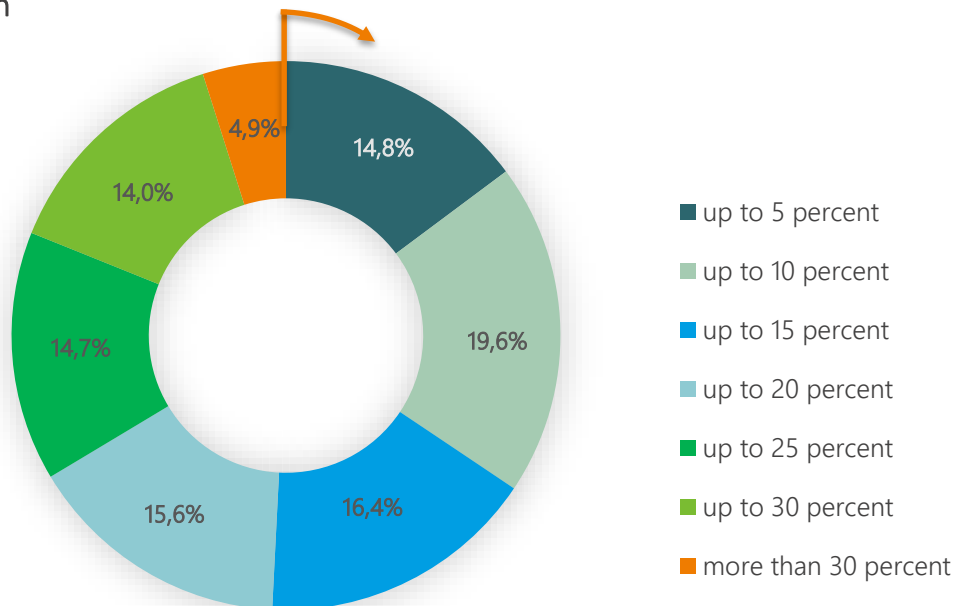
- On average companies in the sample employ 111 people. However, a high level of dispersion with regard to this characteristic can be observed in the sample.
- Taking a more nuanced view of the data enables a clearer understanding of the structure of employee size classes.
- In line with the general distribution of company sizes in the countries examined, the sample reveals a significant presence of small and micro-sized enterprises. Companies with 20 or fewer employees constitute more than one half of all respondents.

*Average number of employees in this category

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Average profit margin



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4 Current state of internationalization in the LiveCom industry



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How do you assess the importance of internationalization for the live communication industry in general?

(open ended)

1 Recognize internationalization as an opportunity and master it as a challenge:

*"Our industry is mainly local, so working internationally may not seem essential at first. But for me, **internationalization is no longer optional—it's essential**. Brands, audiences, and ideas now move across borders faster than ever. For the live communication industry, this means thinking beyond national formats, embracing cultural diversity, and **creating experiences that resonate globally while still feeling authentic locally**. Internationalization serves both as a growth driver—especially when working with international brands—and as a creative accelerator."*

(Organizer/Agency)

*„The importance of internationalization for the live communication industry is huge. [However,] in an increasingly globalized world, **internationalization offers both opportunities and challenges**."*

(Organizer/Agency)

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How do you assess the importance of internationalization for the live communication industry in general?

(open ended)

1 Recognize internationalization as an opportunity and master it as a challenge:

*"[Internationalization is] a **chance to diversify our business and generate new opportunities**, especially with clients who operate internationally."*
(Supplier)

*"We live in a world where less **importance is placed on local suppliers**, and there is a growing tendency to seek out **the most creative, professional, and economically advantageous option**—regardless of the nationality of the company being hired." (Organizer/Agency)*

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How do you assess the importance of internationalization for the live communication industry in general?

(open ended)

2

Achieving a balance between internationalization and localization:

*"The principle of '**think global, act local**' needs to be implemented. Subsidiaries should have full authority to act on their own behalf without involving headquarters in every aspect.*

(Organizer/Agency)

*"It is **better to use local companies** with their own materials than to ship materials all over the world."*

(Supplier)

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How do you assess the importance of internationalization for the live communication industry in general?

(open ended)

3

Leverage a pull effect for your own LiveCom market:

*"Expanding to other countries is generally not very attractive for a Swiss company; however, it is very attractive for companies from other countries to expand into Switzerland. Therefore, **(lower-cost) competition is of great importance to us.**"*

(Supplier)

*"Many international clients regard Vienna as a crucial location, making it a key hub for global events and networking opportunities. The **ability to serve a diverse, international clientele enables companies to remain competitive** and meet the demands of an increasingly globalized world."*

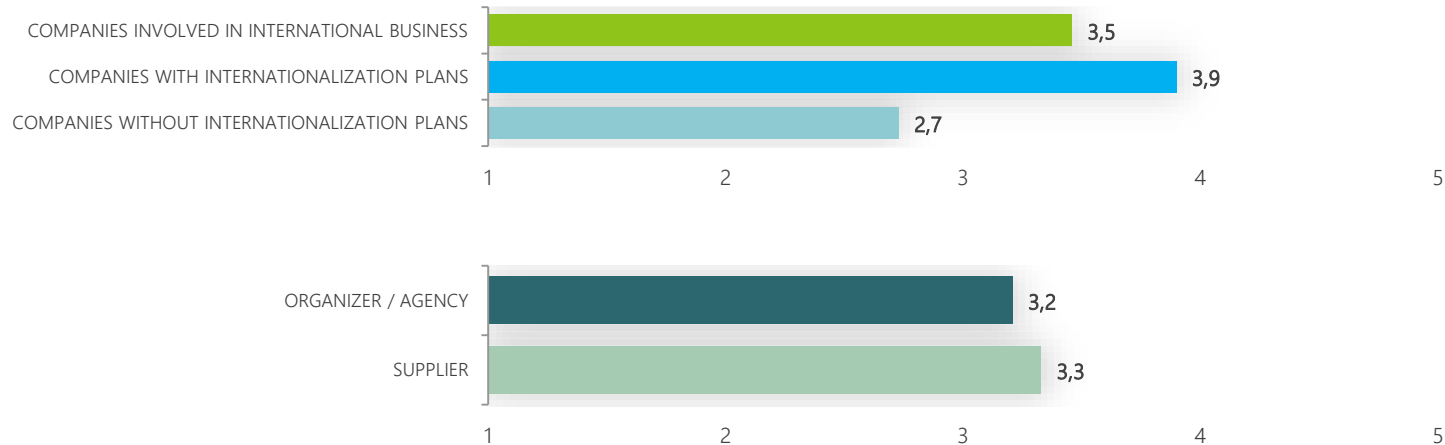
(Organizer/Agency)

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How do you assess the importance of internationalization for the live communication industry in general?

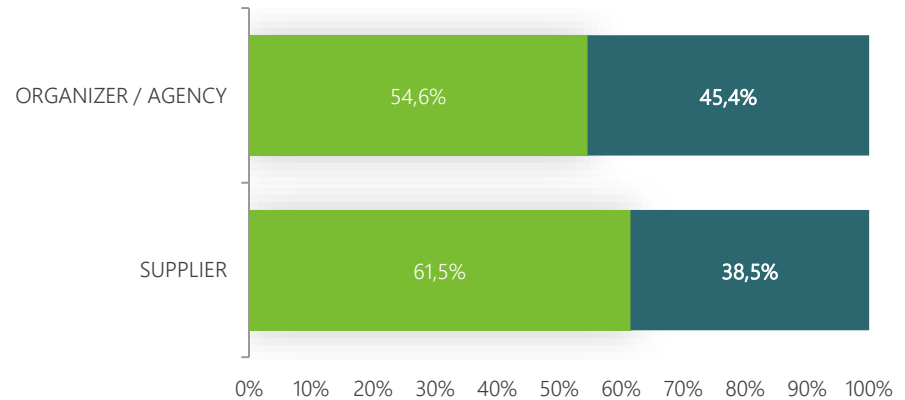
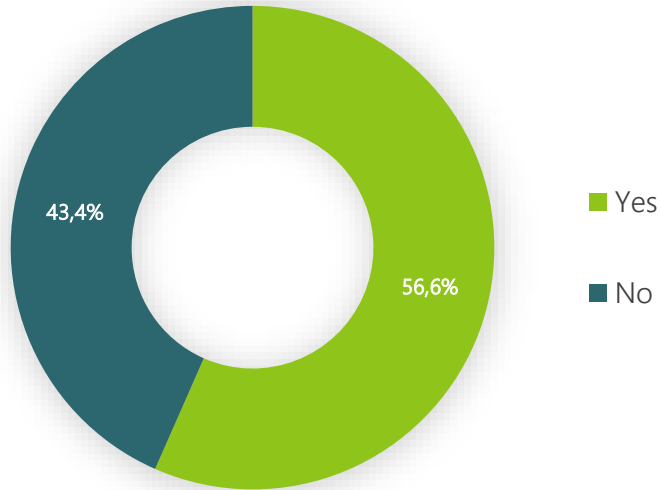
(1-Low Importance – 5-High Importance)



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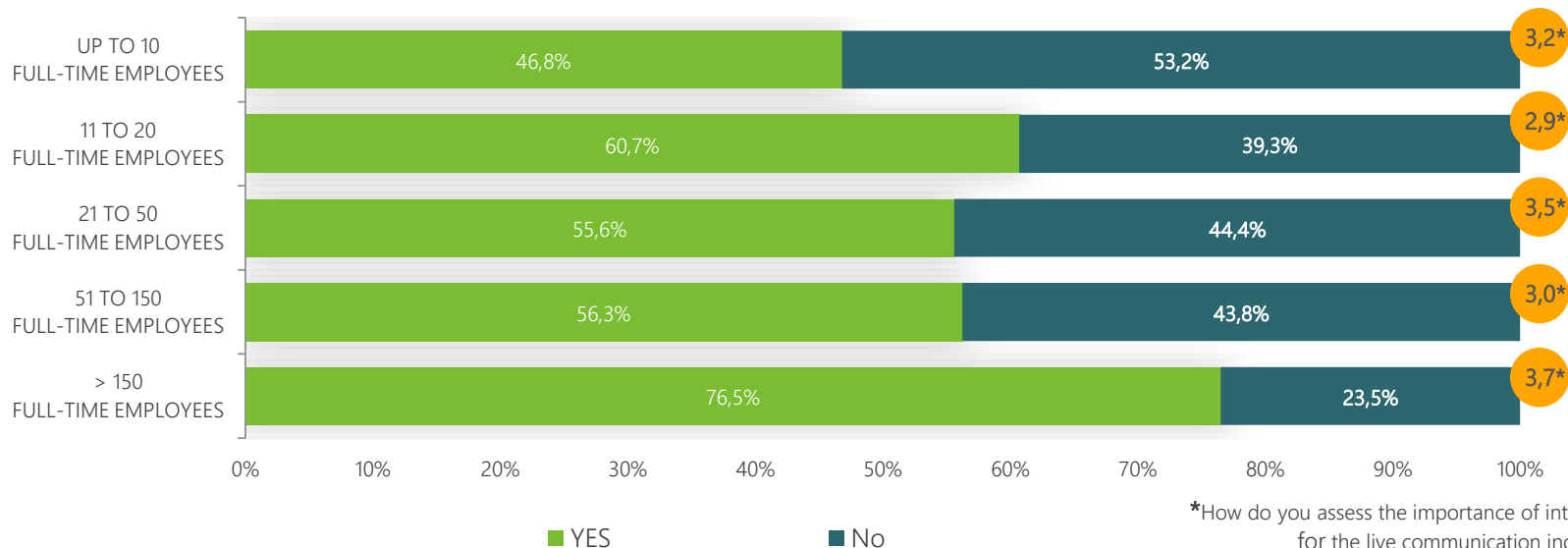
Is your company involved in any form of international non-domestic business?



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Is your company involved in any form of international non-domestic business?



*How do you assess the importance of internationalization for the live communication industry in general?
(1-Low Importance – 5-High Importance)

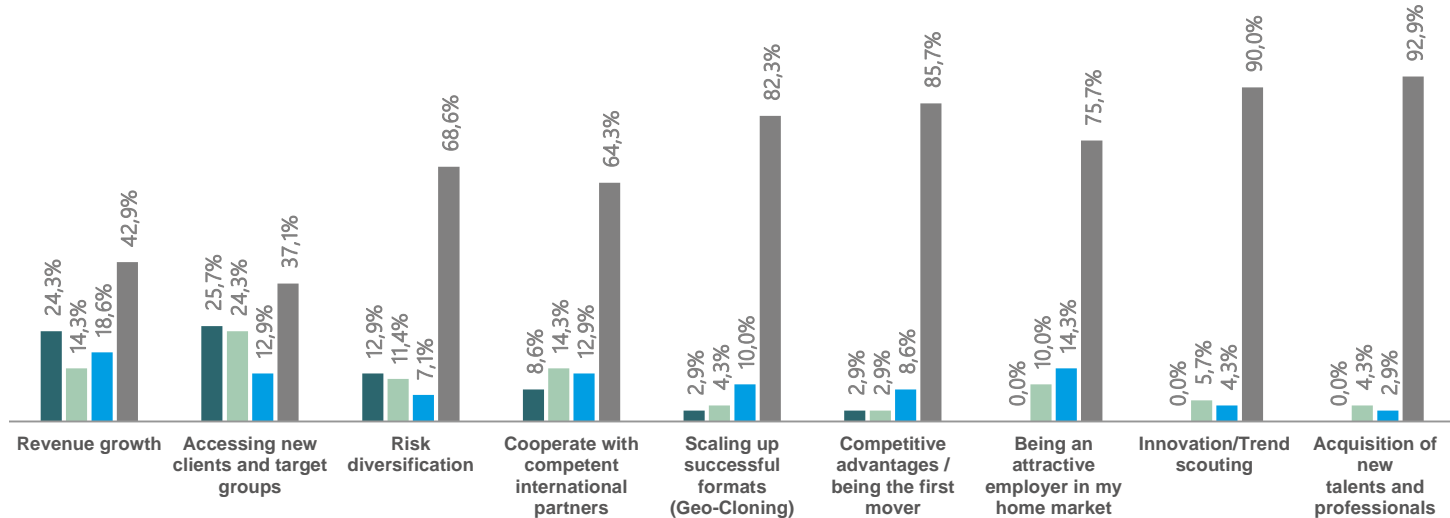
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What do you think are the three top advantages of operating internationally?

(Rank 1 / Rank 2 / Rank 3 / No top 3 Rank)

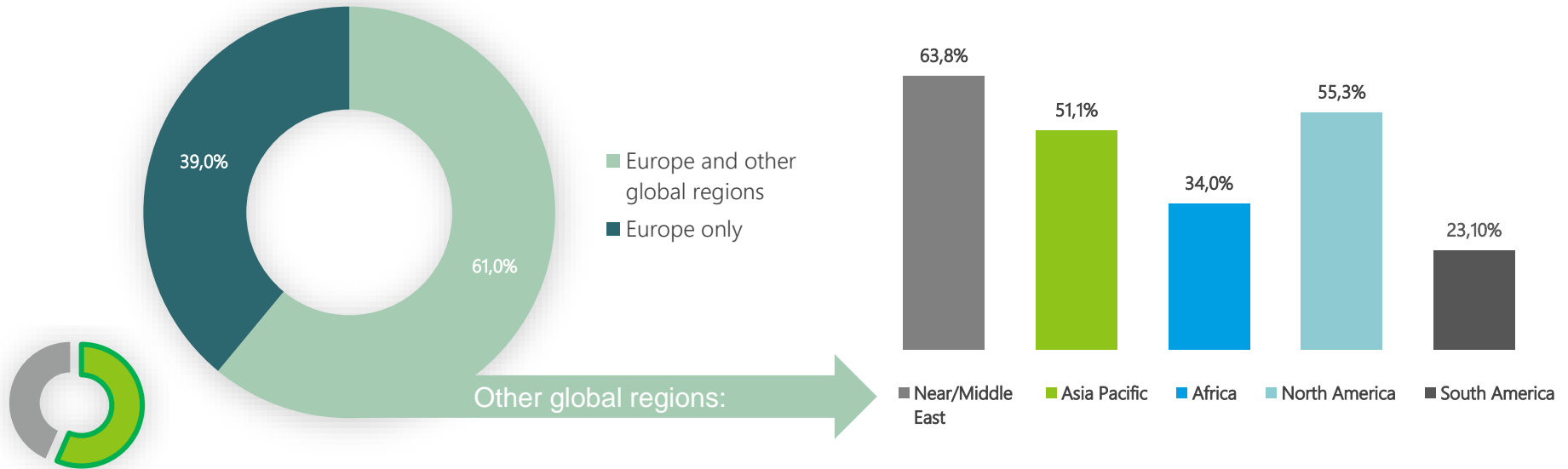
■ Rank 1
■ Rank 2
■ Rank 3
■ No top 3 Rank



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In which regions do you operate your business?



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In your opinion, what are the main differences or challenges of operating in europe only vs. operating globally? (open ended)

1

Cultural Differences

- Intercultural differences/understanding
- Language barriers
- Different time zones, workdays, and working hours

2

Financial Issues/Challenges

- Differences in laws and taxation
- Unstable foreign markets (e.g., exchange rates)
- Prices for materials and (service) providers
- Corruption

3

Travel Barriers

- Unstable international rules, regulations, and customs
- Visa restrictions
- Increasing travel and flight costs

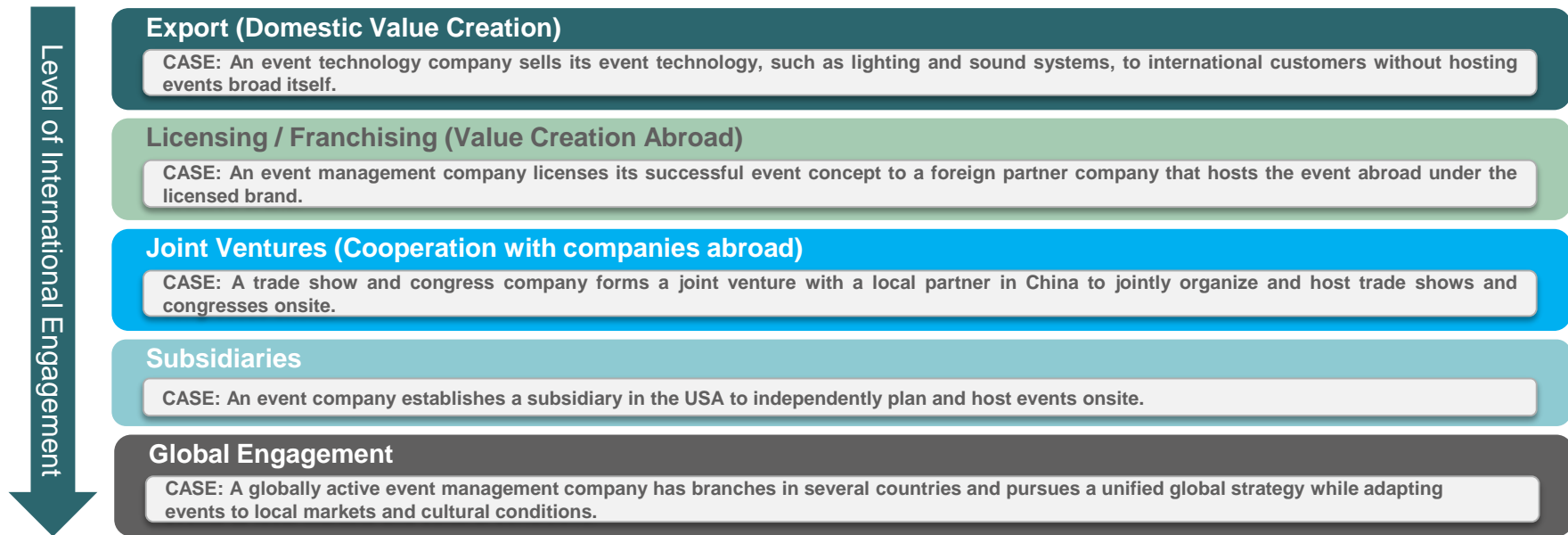
Key differences also lie in varying attitudes, mentalities, and value systems — particularly regarding sustainability, diversity, business norms, and quality standards related to materials and services.



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Levels of International Business Involvement - Definitions

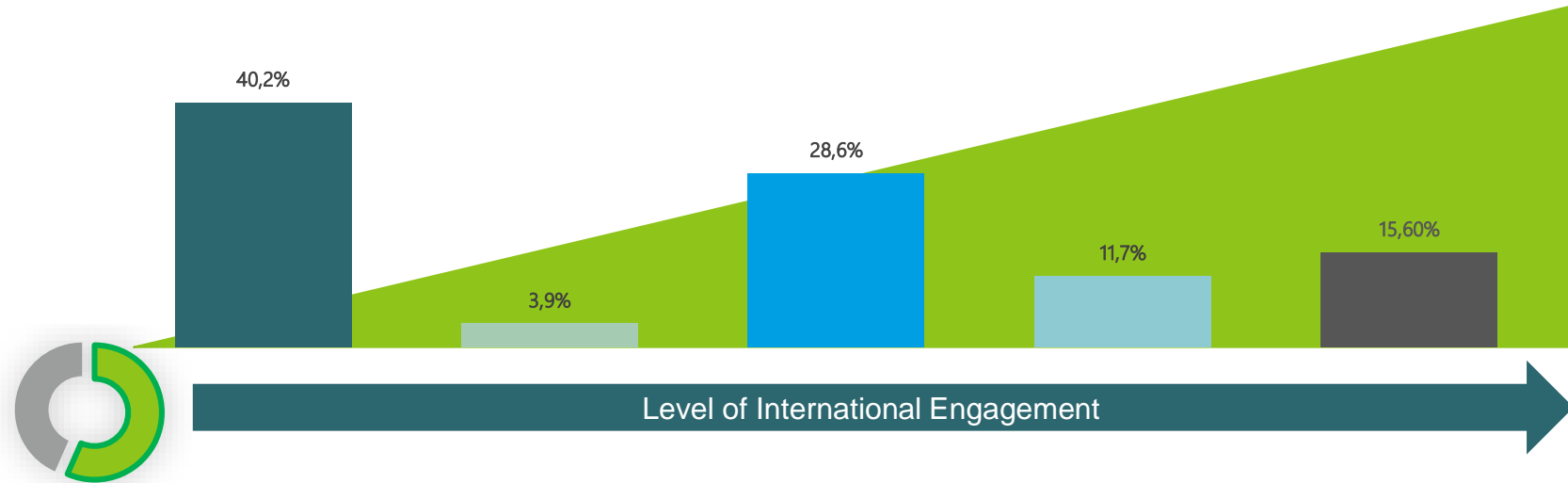


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Levels of International Business Involvement

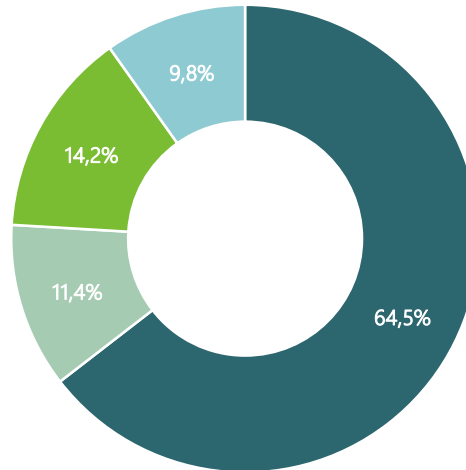
■ Export ■ Licensing / Franchising ■ Joint Ventures ■ Subsidiaries ■ Global Engagement



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Expected Turnover in 2025 – distribution among domestic/non-domestic projects and domestic/non-domestic clients



- domestic projects with domestic clients
- domestic projects with non-domestic clients
- non-domestic projects with domestic clients
- non-domestic projects with non-domestic clients



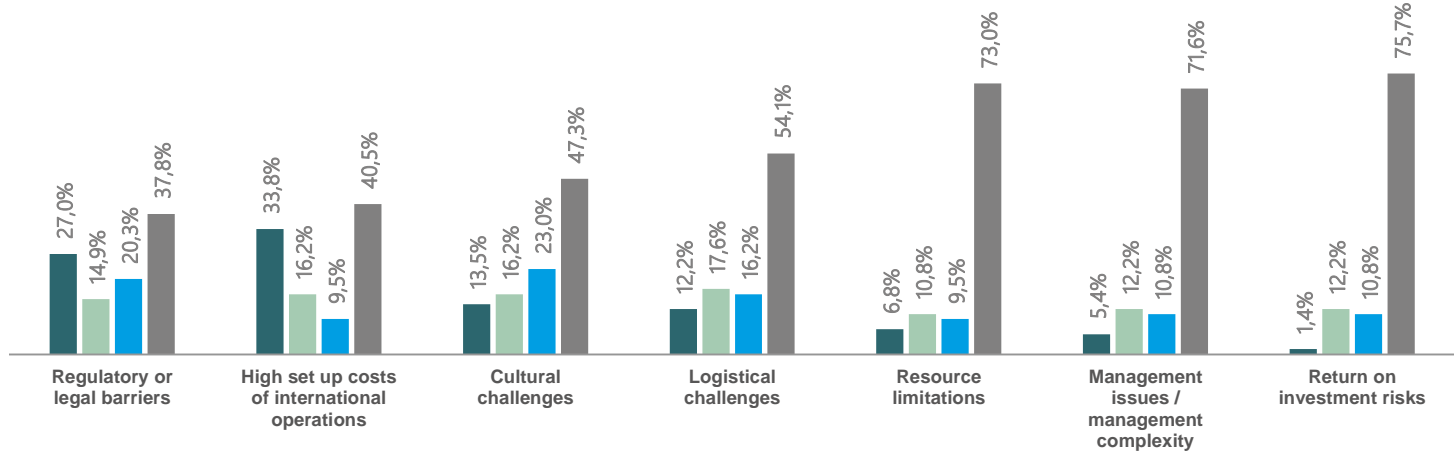
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What are the main challenges of operating internationally?

(Rank 1 / Rank 2 / Rank 3 / No top 3 Rank)

■ Rank 1
■ Rank 2
■ Rank 3
■ No top 3 Rank



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How do you rate your company's ability according to the following criteria with regard to the international operations of your company?

(1-Low ability – 5-High ability)



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How does your company build intercultural competence?

(open ended)

"More formal intercultural competence building may become a higher priority in the coming years as international business grows."

(Organizer/Agency)

1. Diverse and multicultural employee base
2. Recruiting local employees to create long-lasting relationships
3. Formal training to support a flexible approach to cultural differences
4. Exchange of international experience within the company
5. Exchange of international experience with international partners
6. Local presence of employees at events in other countries
7. Participation in international awards



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How does your company achieve international talent acquisition and international leadership?

(open ended)

- 1 Innovative global recruitment strategies;
e.g., local search for local people with an international background, partly through headhunters
- 2 Diverse and inclusive corporate culture
- 3 Flexible work models (hybrid and remote)
- 4 Strategic partnerships with companies, schools, and other institutions
- 5 Use of social media channels
- 6 Managerial oversight of international recruitment activities by the company's board



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Do you have any further recommendations for companies looking to internationalize their live communications business?
(open ended)

- 1 Market research
- 2 Exchange of experiences with domestic competitors and (potential) cooperation partners abroad
- 3 Identifying the right partners
- 4 Participation in international fairs and events
- 5 Cooperation with international associations
- 6 Export of proven event formats (geocloning)

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Do you have any further recommendations for companies looking to internationalize their live communications business?
(open ended)

„Think global, act local.”

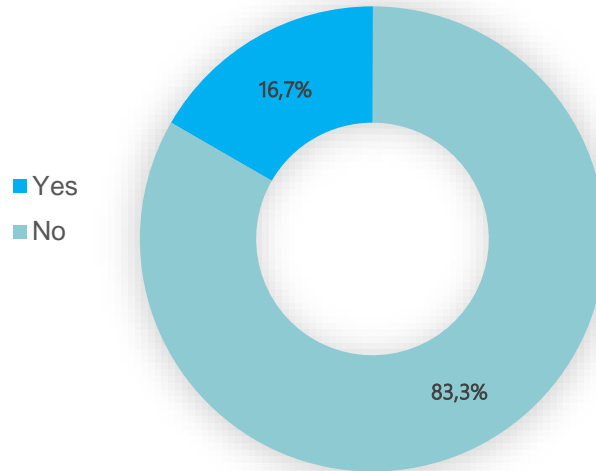
Build strong local relationships, invest in cultural understanding, and stay flexible. **International success starts with listening.**“

(Organizer/Agency)

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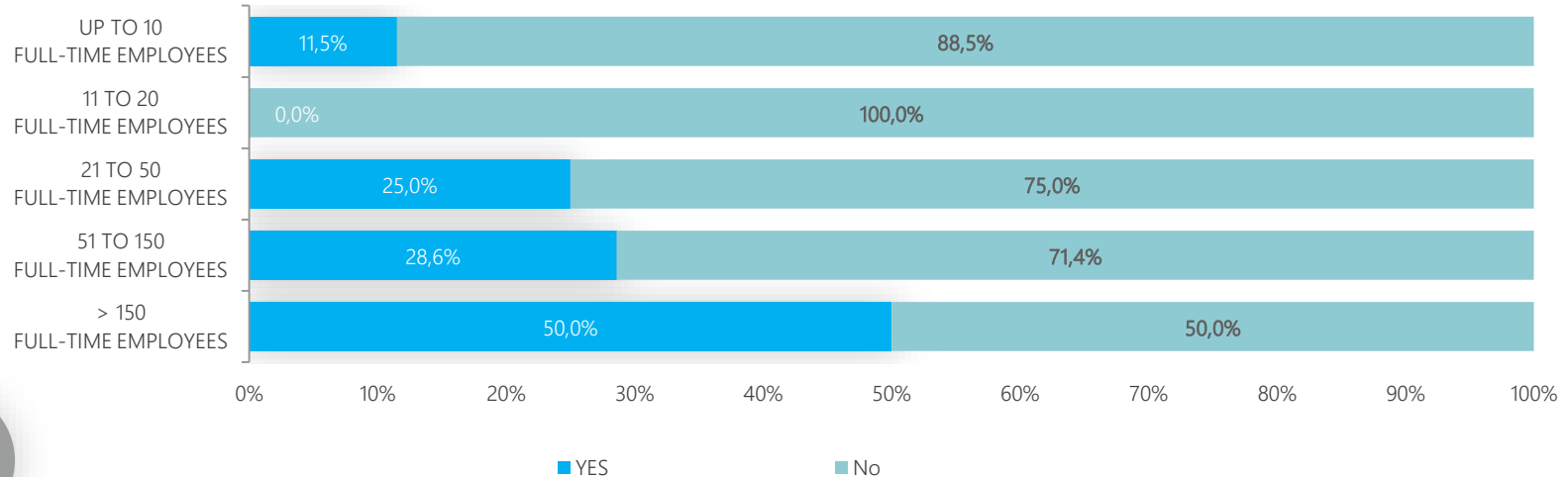
Does your company have plans for internationalization?



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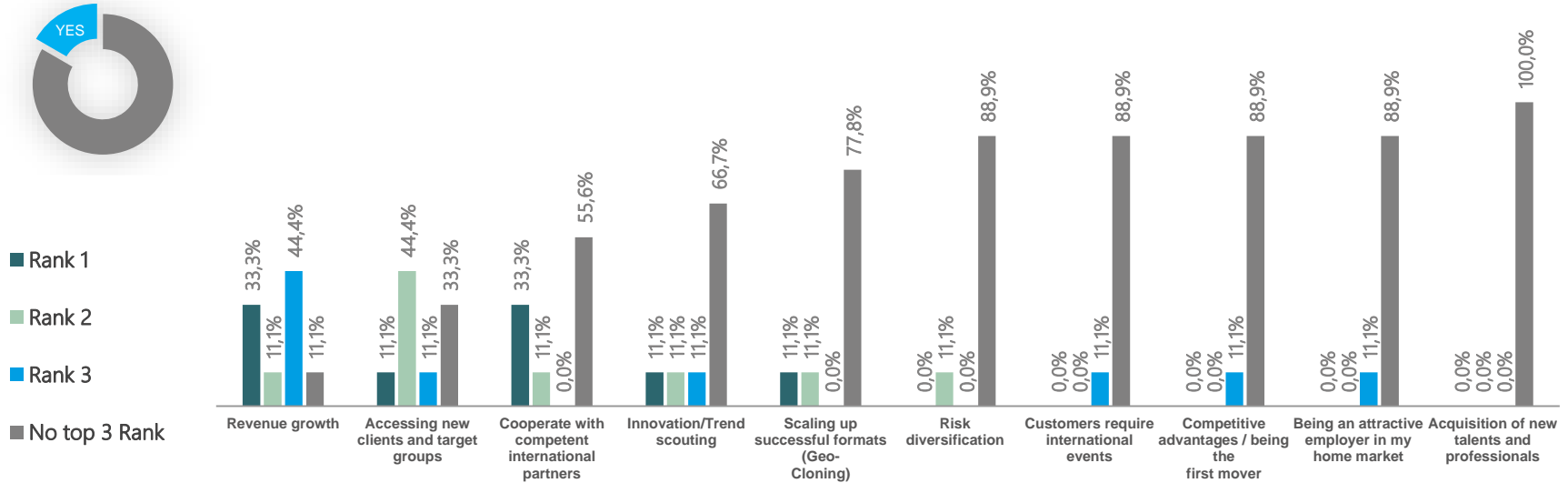


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What advantages do you expect from operating internationally?

(Rank 1 / Rank 2 / Rank 3 / No top 3 Rank)

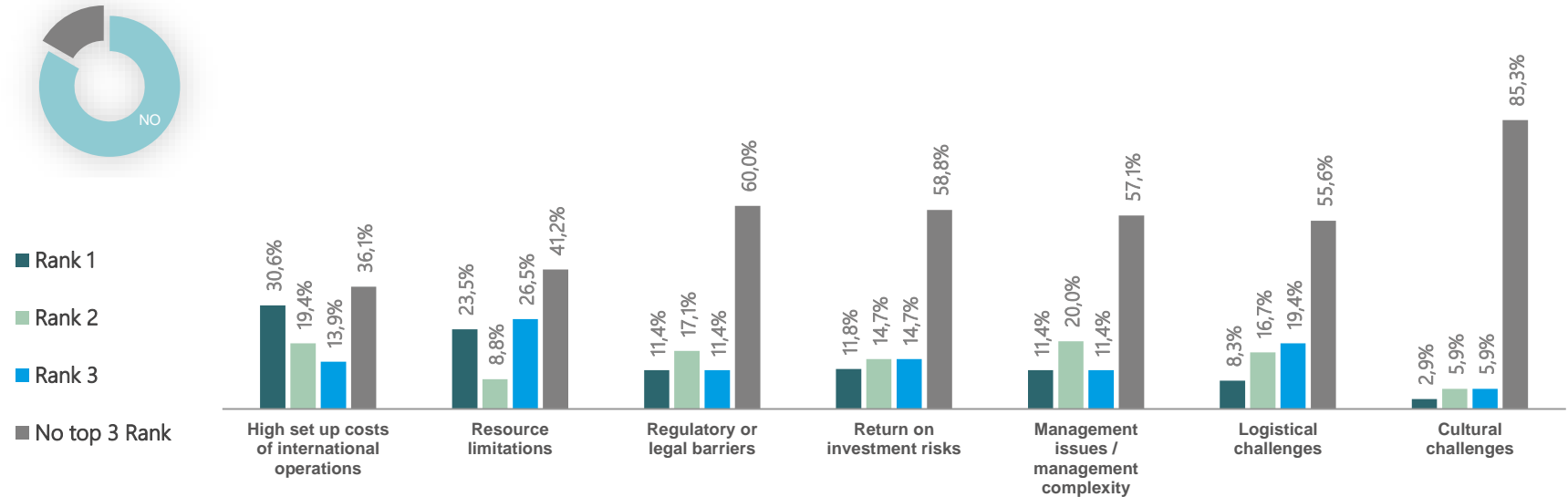


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Why does your company not have plans to operate internationally?

(Rank 1 / Rank 2 / Rank 3 / No top 3 Rank)



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5 Success drivers of internationalization

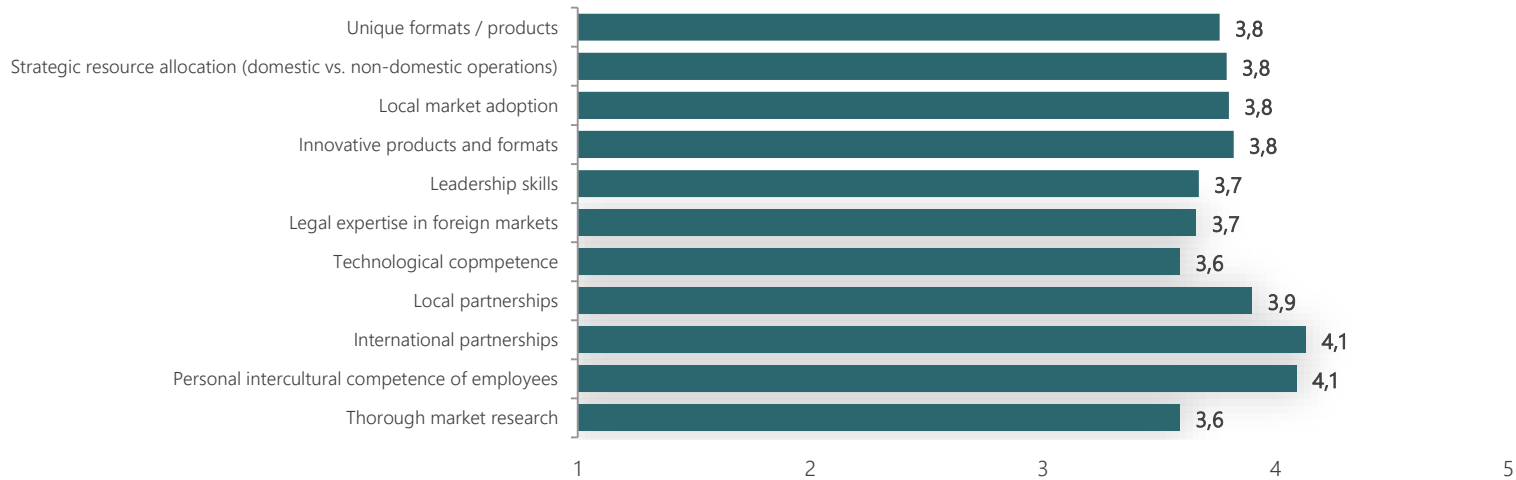


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In your opinion, how strongly do the following factors influence the success of international operations in the live communication sector?

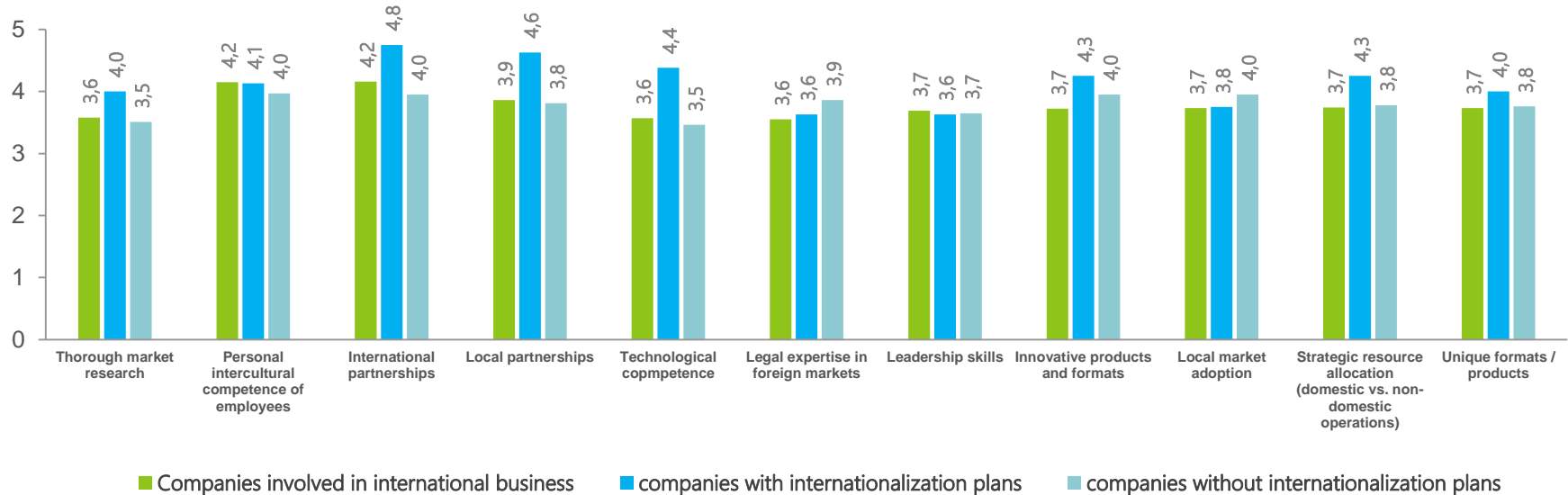
(1-Weak Influence – 5-Strong Influence)



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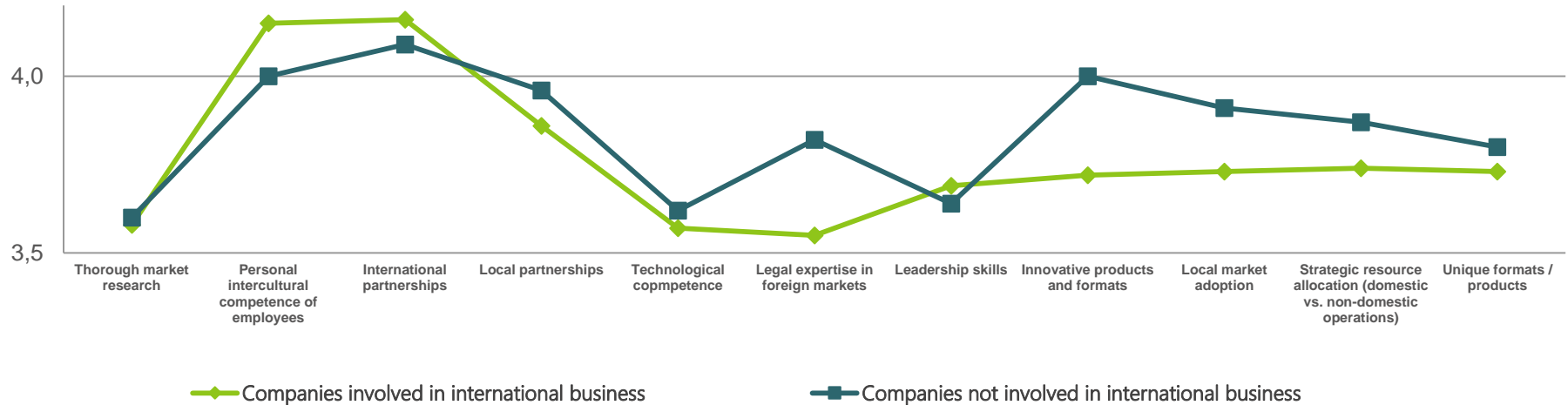
In your opinion, how strongly do the following factors influence the success of international operations in the live communication sector? (1-Weak Influence – 5-Strong Influence)



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In your opinion, how strongly do the following factors influence the success of international operations in the live communication sector? (1-Weak Influence – 5-Strong Influence)



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What role do you believe does technological innovation play in the internationalization of live communication industry? (open ended)

„Technology breaks down borders, scales creativity, and enables real-time collaboration across continents which is The asset.“
(Organizer/Agency)

1

Marketing Intelligence / Automation

- Data analytics help identify promising markets and adapt concepts to local cultural contexts.
- Personalization and tailored content.
- AI and various innovations should be implemented across multiple sectors and use cases.

2

Digital Platforms

- Connect stakeholders in the live communication business.
- Eliminate geographical limitations.
- IoT solutions allow specialists to monitor event technology remotely, reducing the need for international staffing.

3

Project Management / Communication

- Cloud collaboration tools connect Dutch teams with international vendors and staff across time zones.
- Facilitate communication within teams, reducing language barriers and improving cooperation.

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What role do you believe does technological innovation play in the internationalization of live communication industry? (open ended)

„Technology breaks down borders, scales creativity, and enables real-time collaboration across continents which is The asset.“
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4

Enhanced Attendee Experience

- Mobile apps and RFID technologies create unique experiences that overcome language barriers.
- Immersive technologies such as AR, VR, and metaverse events enhance global engagement.

5

Cross-Border Marketing

- Programmatic advertising enables precise targeting of international audiences with measurable results.

6

Ecological Advantage

- The ability to create international projects without generating a large carbon footprint is very appealing, and technological innovations could play a key role in achieving this.

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What partnerships or collaborations do you think are important for international expansion?

(open ended)

- 1 Local Suppliers / Local Event Agencies
- 2 Technology Providers
- 3 Media and Content Partners
- 4 Venue and Logistics
- 5 Corporate and Brand Alliances
- 6 Government, Trade Organizations and Chambers of commerce

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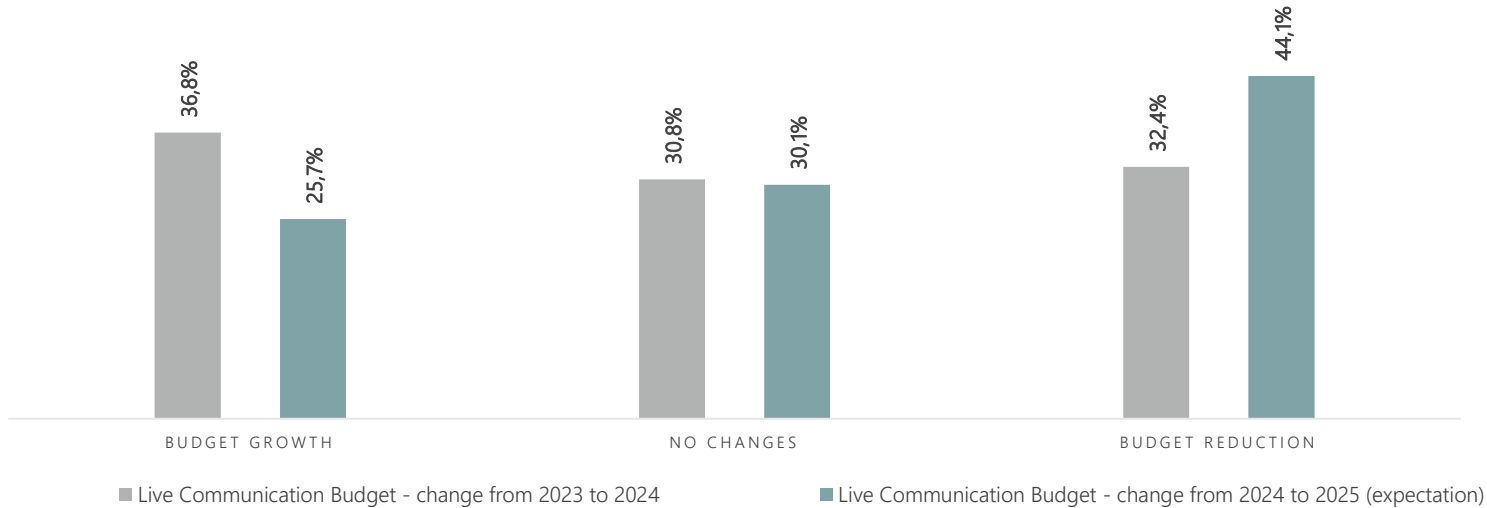
6 Industry trends and outlook



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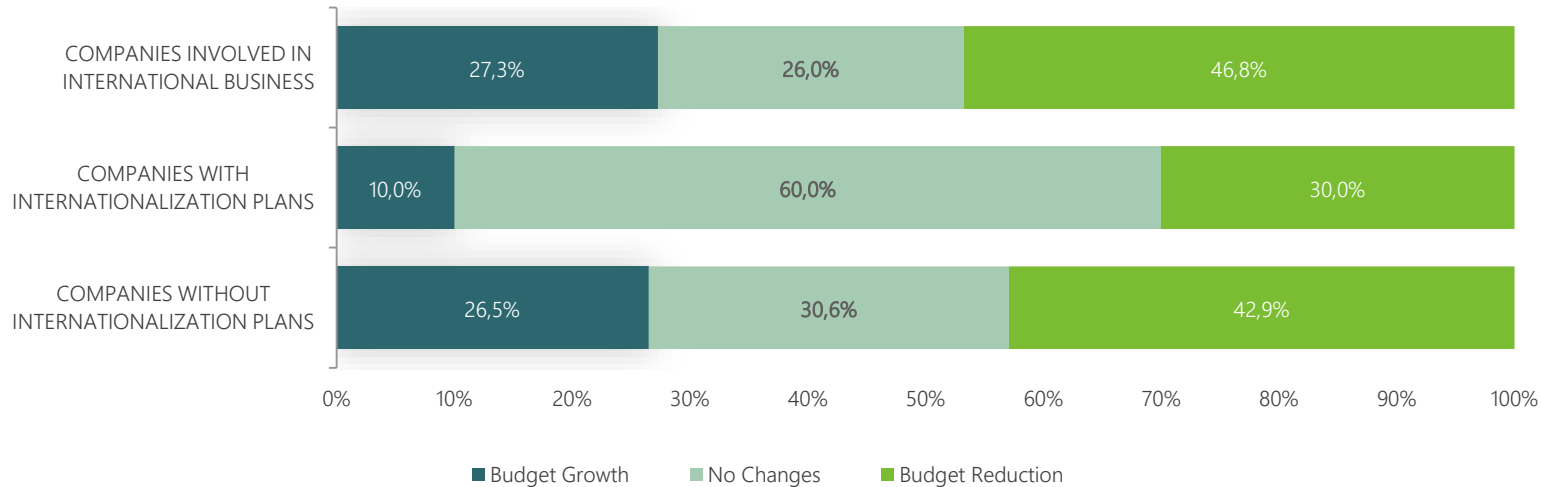
Change of customers' live communication budgets



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Expected change of customers' live communication budgets from 2024 to 2025

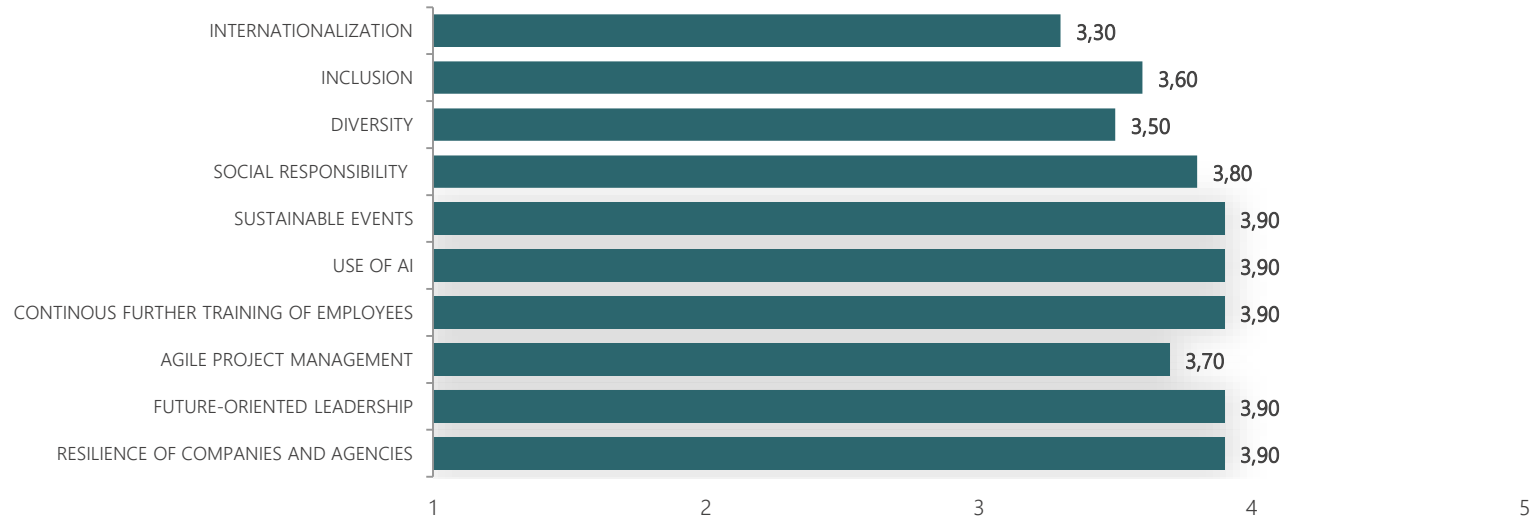


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What are the key trends/topics in LiveCom for 2025/2026?

(1-not important at all – 5-very important)

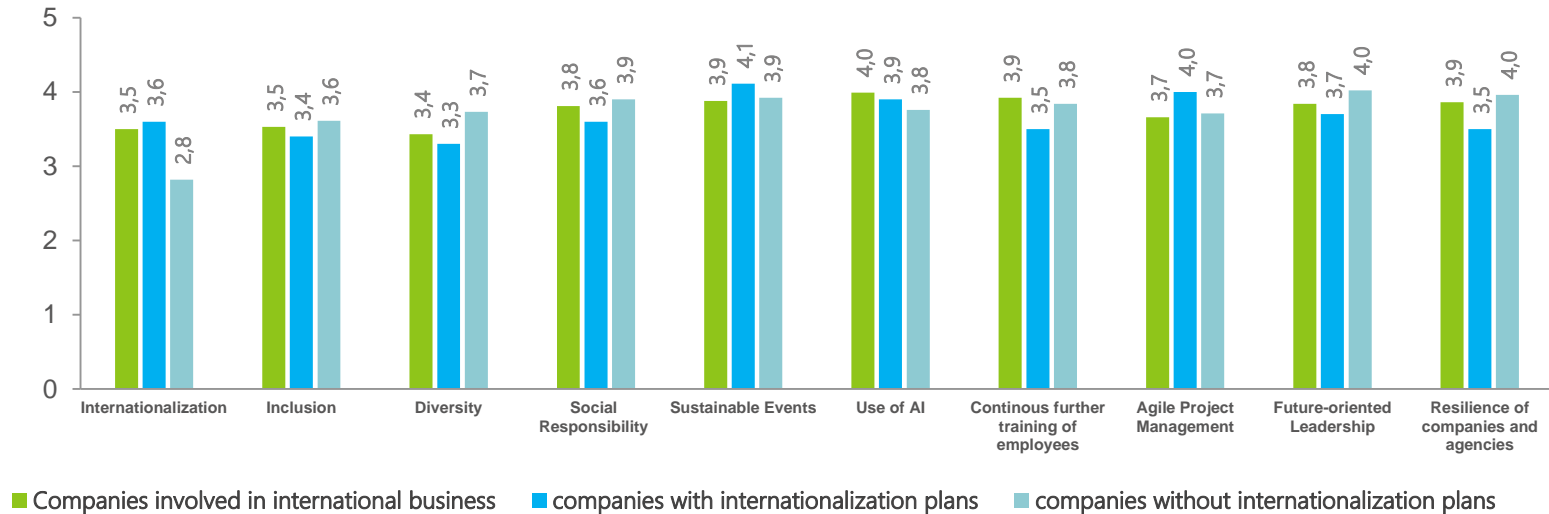


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What are the key trends/topics in LiveCom for 2025/2026?

(1-not important at all – 5-very important)



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What are the key trends/topics in LiveCom for 2025/2026? – “others”

(open ended)

- 1 Innovative concepts, addressing all the senses
- 2 Incorporating trending topics such as sports, luxury, and gaming
- 3 Digital transformation and modern technologies like AI
- 4 Agility in company management
- 5 Cost management
- 6 *Key focus for suppliers: Event security*