

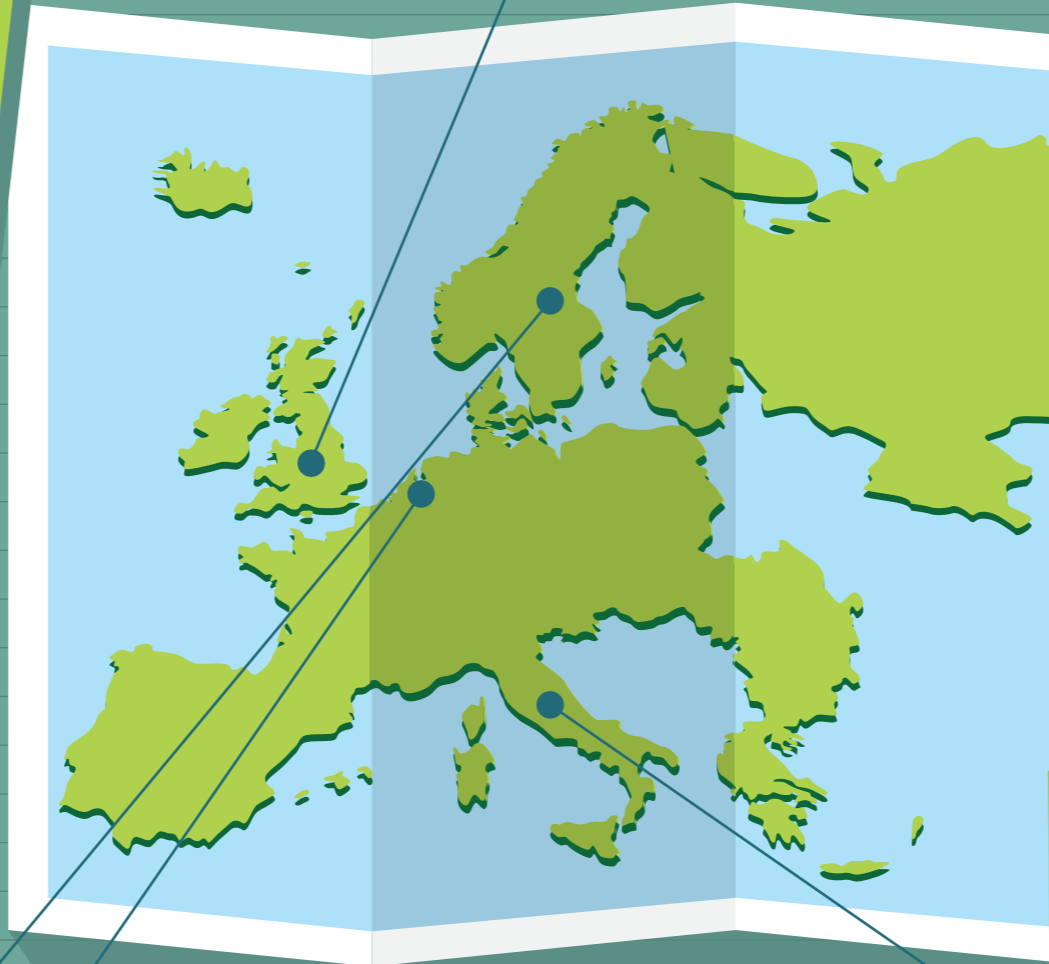
LIVECOM ALLIANCE EUROPEAN INDUSTRY SURVEY



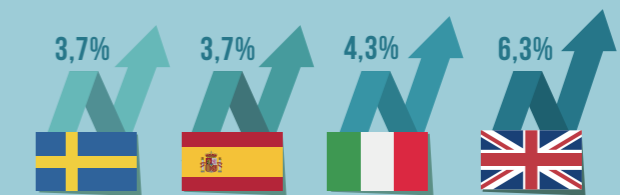
98% of consumers create content during events
35% of brands use events to create content
90% of brands will spend the same or more on event content in 2016

BUDGET TREND

	DECREASE	SAME	INCREASE
NETHERLANDS	14%	30%	56%
BELGIUM	31%	42%	27%
SPAIN	19%	46%	35%
GERMANY	14%	59%	27%
ITALY	21%	30%	49%
UK	6%	74%	20%
AVERAGE	18%	47%	36%



BUDGET FORECAST



LIVE COMMUNICATION SHARE IN MARCOM MIX



USP's live communication agencies

Professionalism
Experience Partnership
Strategic consultancy/conceptualization for events
Specialty / craftsmanship
Fixers/do the work
Digital strategy
To secure/risk management

Future industry themes

Effective measurement / ROI
Meeting Design
Digital- web- interactive strategy
Compliance Knowledge in trends
360 degrees creative platform

Clients invest 59,4% of event budget in event marketing (57% B2C, 43% B2B) and 40,6% in corporate events

Average lead-time events: 6 months, 20% > 12 months, 20% < 3 months (49% in '14)

Agency position

- Events are considered as services for specialized agencies
Almost 60% of the budget goes to integrated agencies, but this implies 40% goes to other agencies (on average 3,2 type of agencies)
- 51% of the brands are in favour of having a pool of agencies instead of 360° agencies
- 34,5% of clients organizing events work with an agency

53% of clients prefers defining our industry by 'live communication' in stead of 'events'