ISE

integrated systems europe

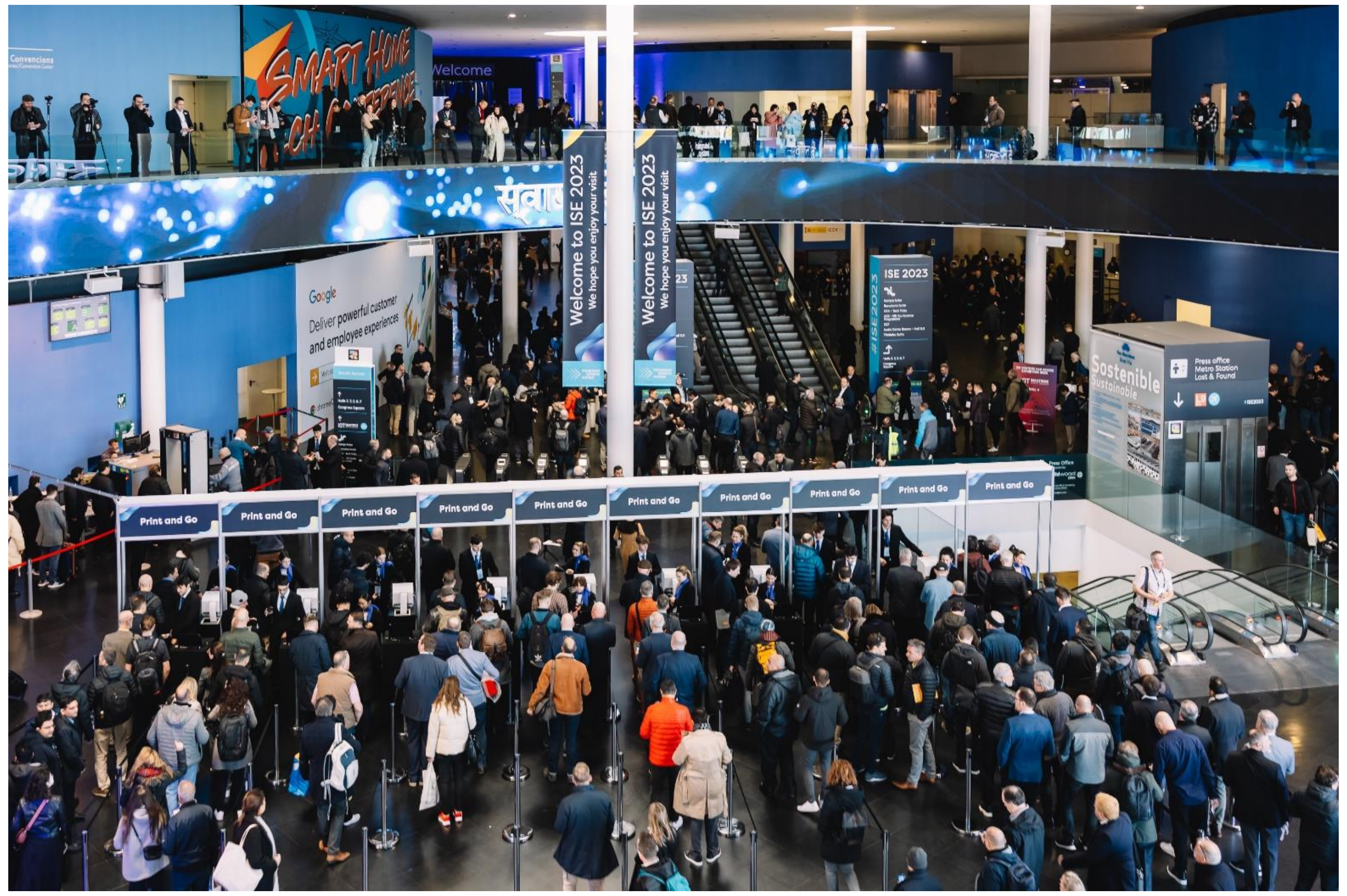
The worlds' leading AV and systems integration show.

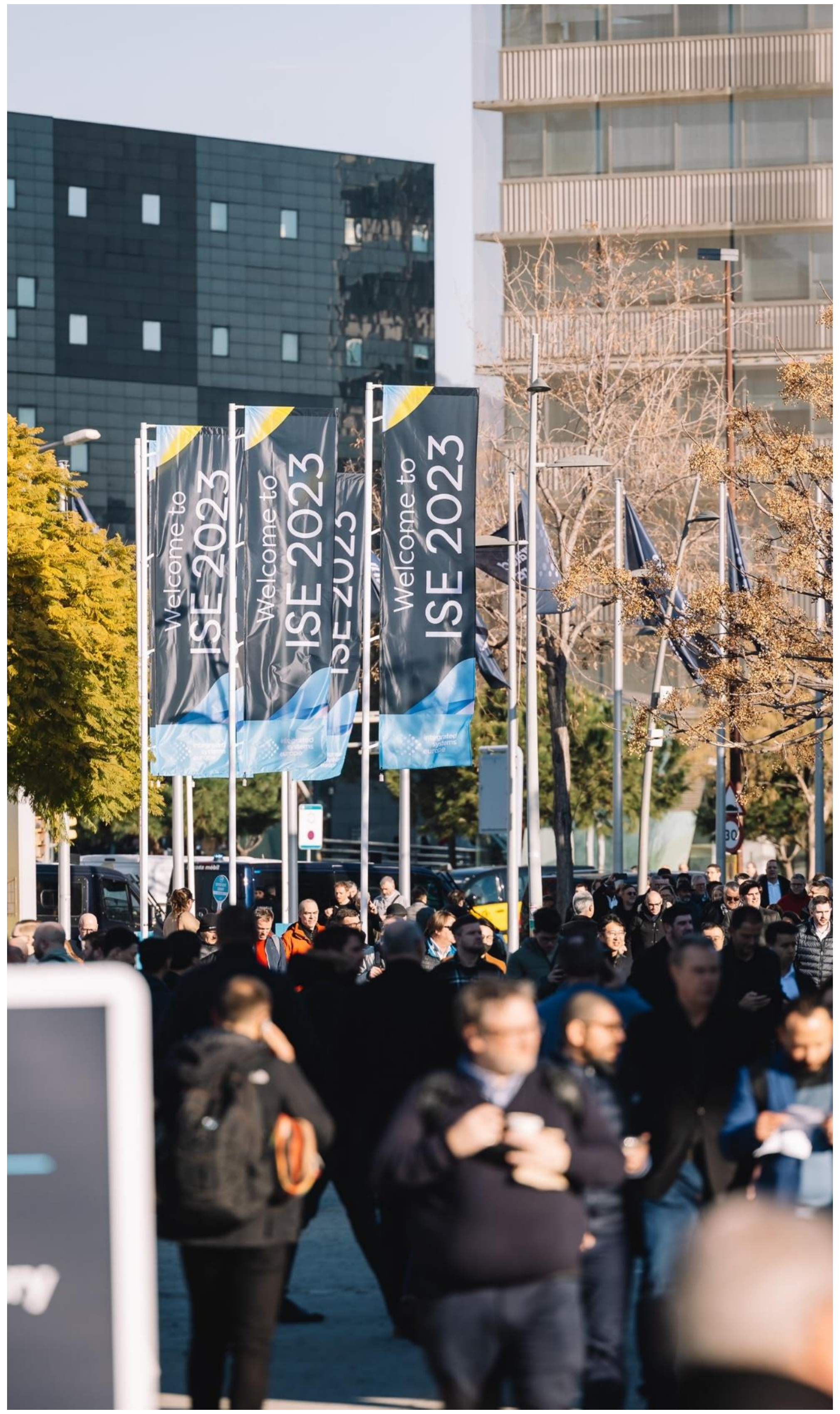
All the connections you need.

AVIXA CEDIA

Introduction

ISE is the place where the AV industry comes together. With attendance from 170 countries it's where the kick-offs happen, it's where the new products are launched, it's where people come to learn and be inspired.





The AV Market

Corporate AV will contribute the strongest growth

A joint venture partnership of AVIXA CEDIA

Pro AV set to add nearly $100B in revenues over the next five years.

With pandemic recovery largely in the past, the industry is poised for healthy growth through 2028, even if year over year percentages decline somewhat. Growth comes from the expanding role of technology across markets.

With the strong growth generated from the pandemic recover now past, the 5-year trajectory shows a return to more pre-pandemic levels. This translates to a CAGR of 5.6%. While lower than recent results this adds nearly $100B to the pro AV sector, setting new records each year.

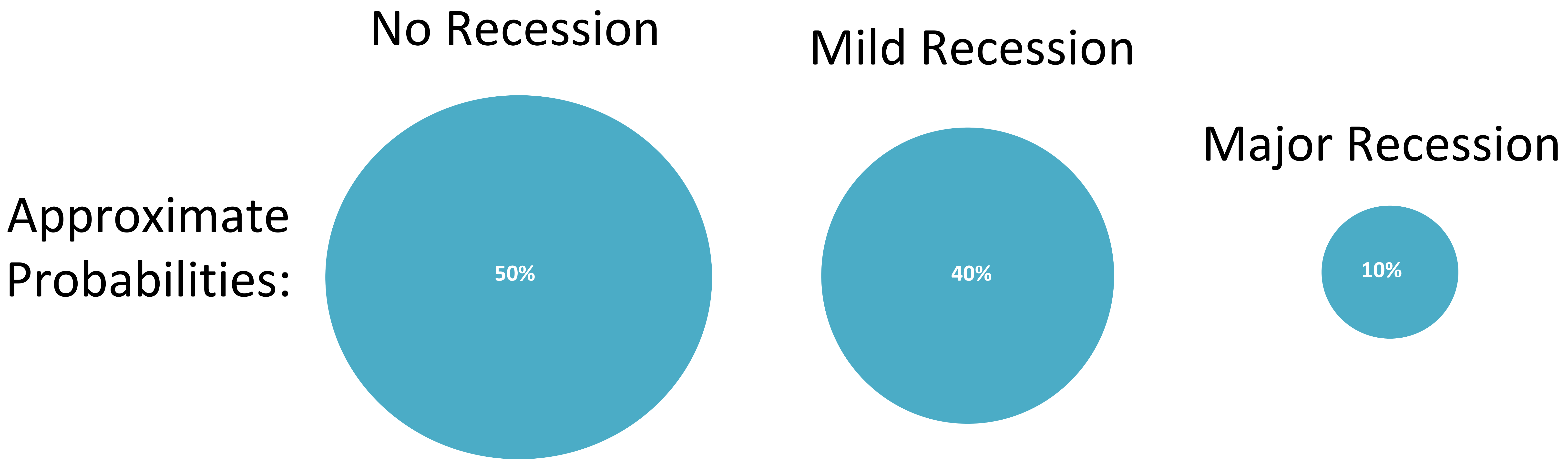
2022
$285
BILLION

2023
$307
BILLION

2028
$402
BILLION

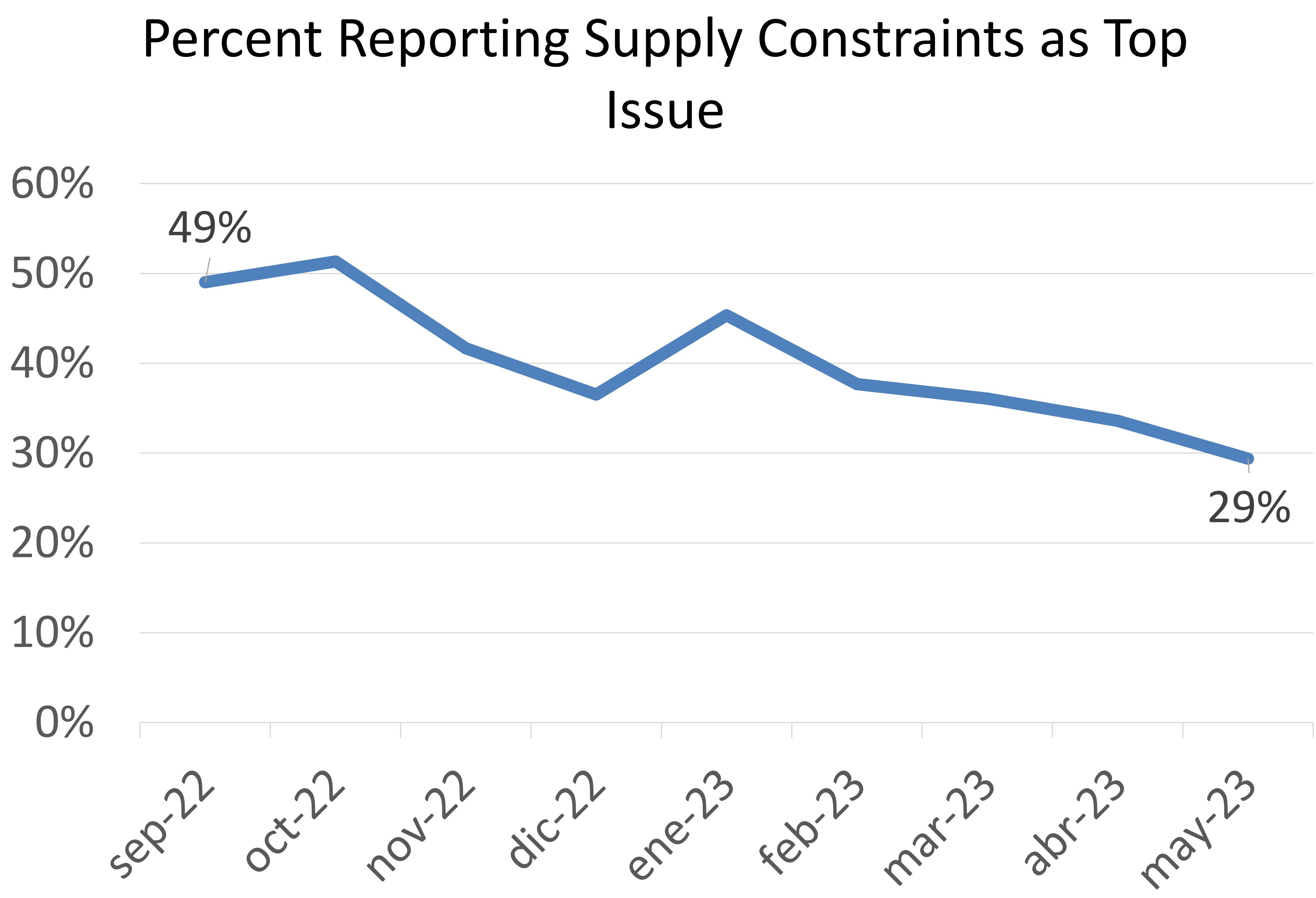
Recession is more likely than normal in the near term, near 50%

The good news is that a recession—should one happen—is likely to be mild.



Early 2023 has seen Europe on the edge of recession, and the odds of a broader recession in the second half of 2023 or the beginning of 2024 are higher than normal, perhaps around 50%. These elevated recession odds have been something of a “new normal” since mid-2022. The good news is a near-term recession is likely to be mild. It might be tough to tell a “no-recession” scenario apart from a “recession” one, as low economic growth is likely even if we avoid a true recession. Major recession is possible but unlikely. Note: APAC is likely to avoid a recession and projects to have stronger 2023 growth.

Supply constraints were a major factor in 2022 but are now easing.



- Supply issues were a major barrier to recovery in 2022. Growth happened, but at a slower rate.
- The issues were exceptionally uneven. Many projects were delayed, but generally by only a few products that were on lengthy back order.
- Some major products were actually oversupplied and saw significant deflation (e.g., displays). This had a meaningful impact on growth rates.
- Supply is increasingly easier. Recession could be the new top issue by late 2023.

Short term economic weakness, long term is stronger.

Recession is possible in the short-term, but the long-term outlook is largely unaffected.

AMERICAS

Growth in the Americas came in below expectations in 2022 (2.4% vs 3.5%), and the latest numbers for 2023 and 2024 now come in low, at 1.5% and 1.3%. There is better news in the long-term, which has seen an uptick from last year's projections of below 2% to now just above 2%.

EMEA

EMEA outperformed its initial projection for 2022, but the 2023 outlook has declined and looks to be just above 1%. Growth is forecast to recover to 2% in 2024 and stay there or just above through 2028.

APAC

APAC has the strongest short-term outlook, with 4.2% growth in 2023 and 3.9% in 2024. However, news in the last year has slightly soured the long-term outlook, especially for China. Where last year, long-term growth projected near 4% (and 5% for China), this year, it projects near 3.5% (same for China).

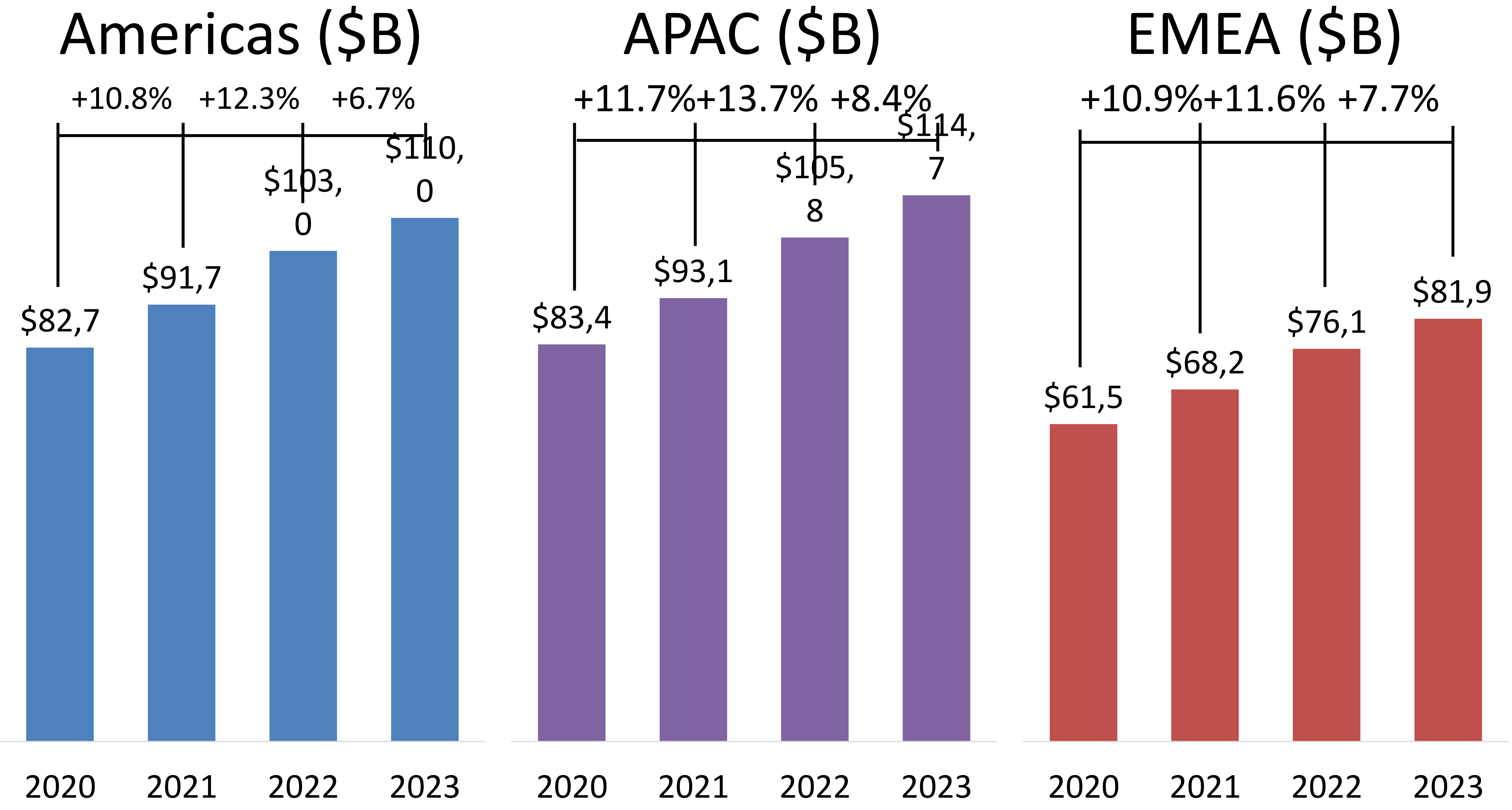
Growth rates across regions reflect local differences.

All areas saw surging demand in 2022, though at varying degrees. APAC continues to lead.

APAC economies are resulting in higher growth each year, also contributing to its position as the largest region for pro AV spending.

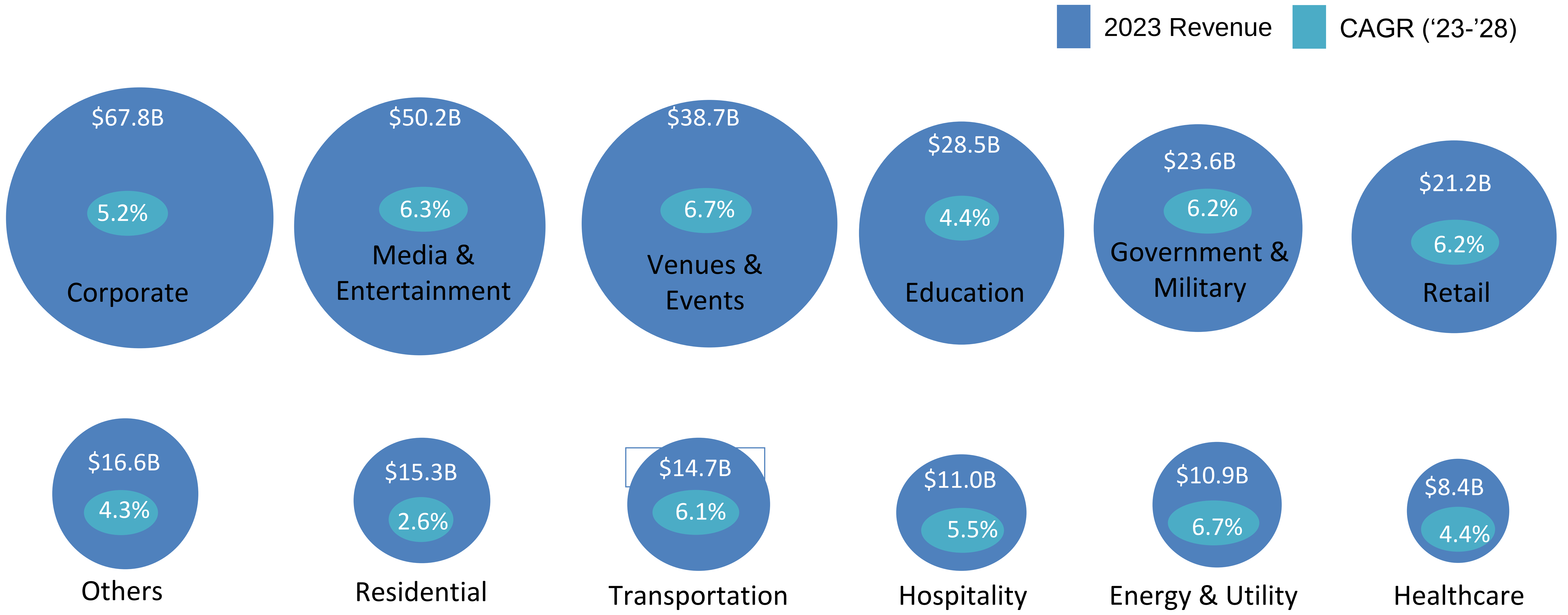
The Americas were stronger in 2022 as in person surged back, but are expected to see lower 2023 growth.

EMEA experienced the lowest growth in 2022 due to the Ukraine War. Inflation is higher and so is propping up growth slightly in 2023.



Market growth is levelling out across industries, post pandemic.

Now that the return to in-person has largely occurred, the various markets are returning to a more normal rate of growth, clustered around the average. Highlights include venues, energy, and media.



Market ranking show minor shifts by 2028.

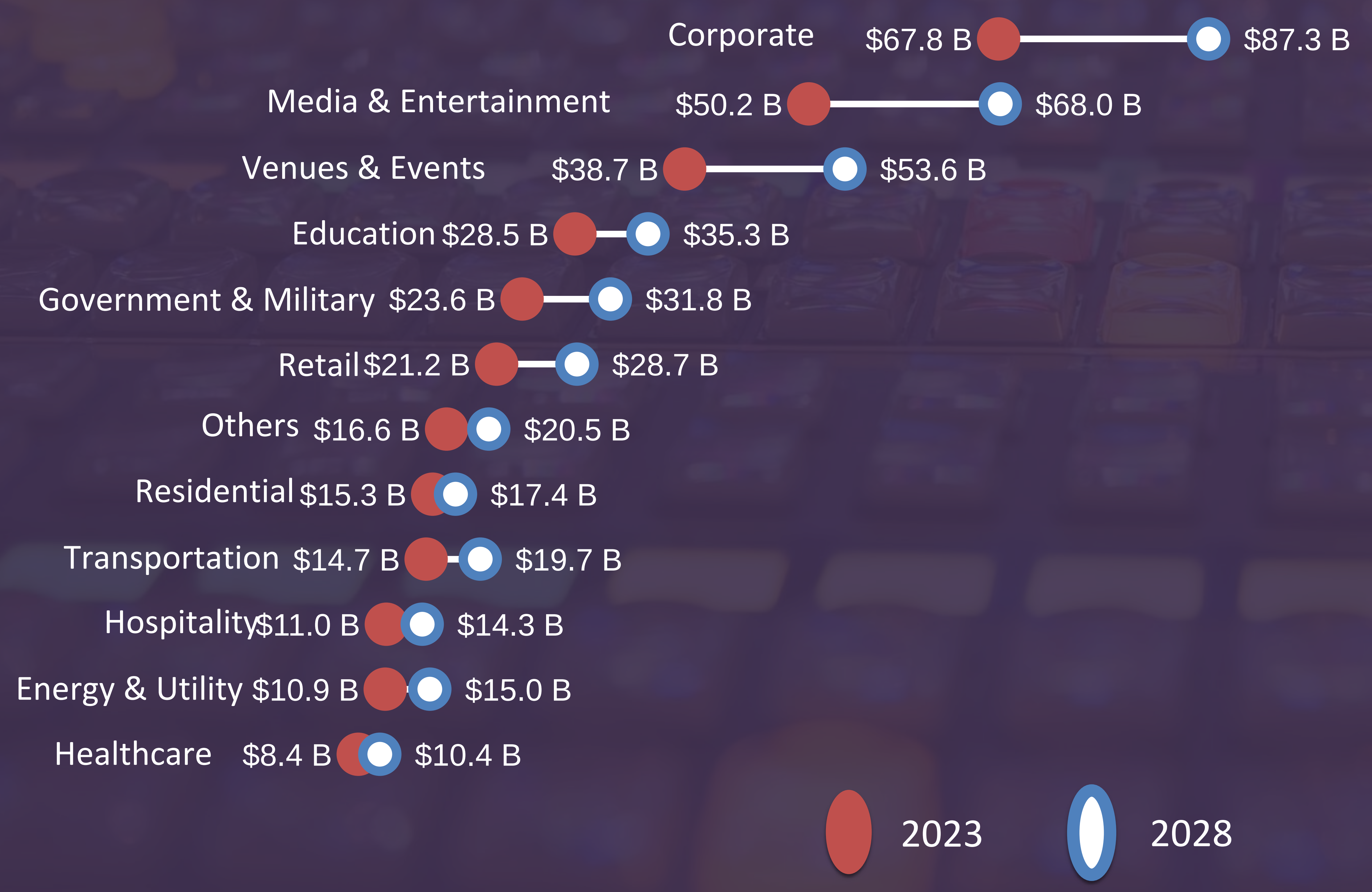
Transportation and energy move up as broader investments in both areas trickle down.

Transportation Enhancements

As travelers these days can attest, transportation hubs have been receiving a face lift. Digital signage is at the core of this, with many more displays being installed to direct and inform travelers. At the same time, security and surveillance systems are also advancing, driving additional AV spending.

Sustainable Energy

Across many parts of the globe, investments are being made to transition to sustainable sources of energy and to improve grids. This also trickles down into the AV industry, most often in the form of control rooms for monitoring. While not a huge market for AV, it is one to watch for upside as the top-level investments increase.

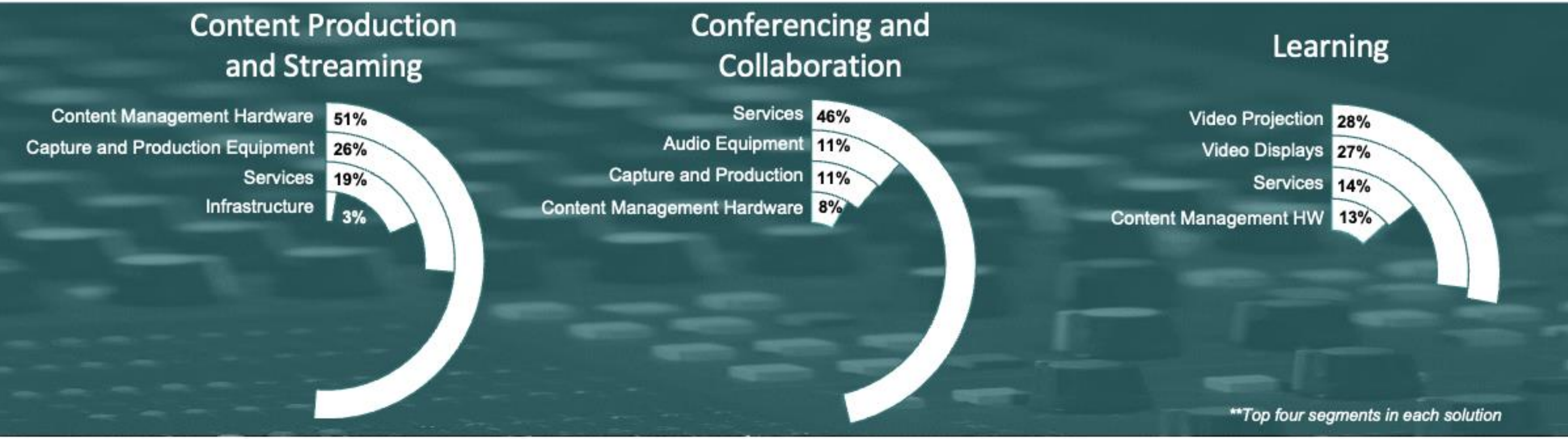


Solution areas blurred during the pandemic; this shifts back.

Remote work, learning, and audience engagement over the past year meant similar technologies were deployed to address. As in-person returns the solutions return to differentiation.

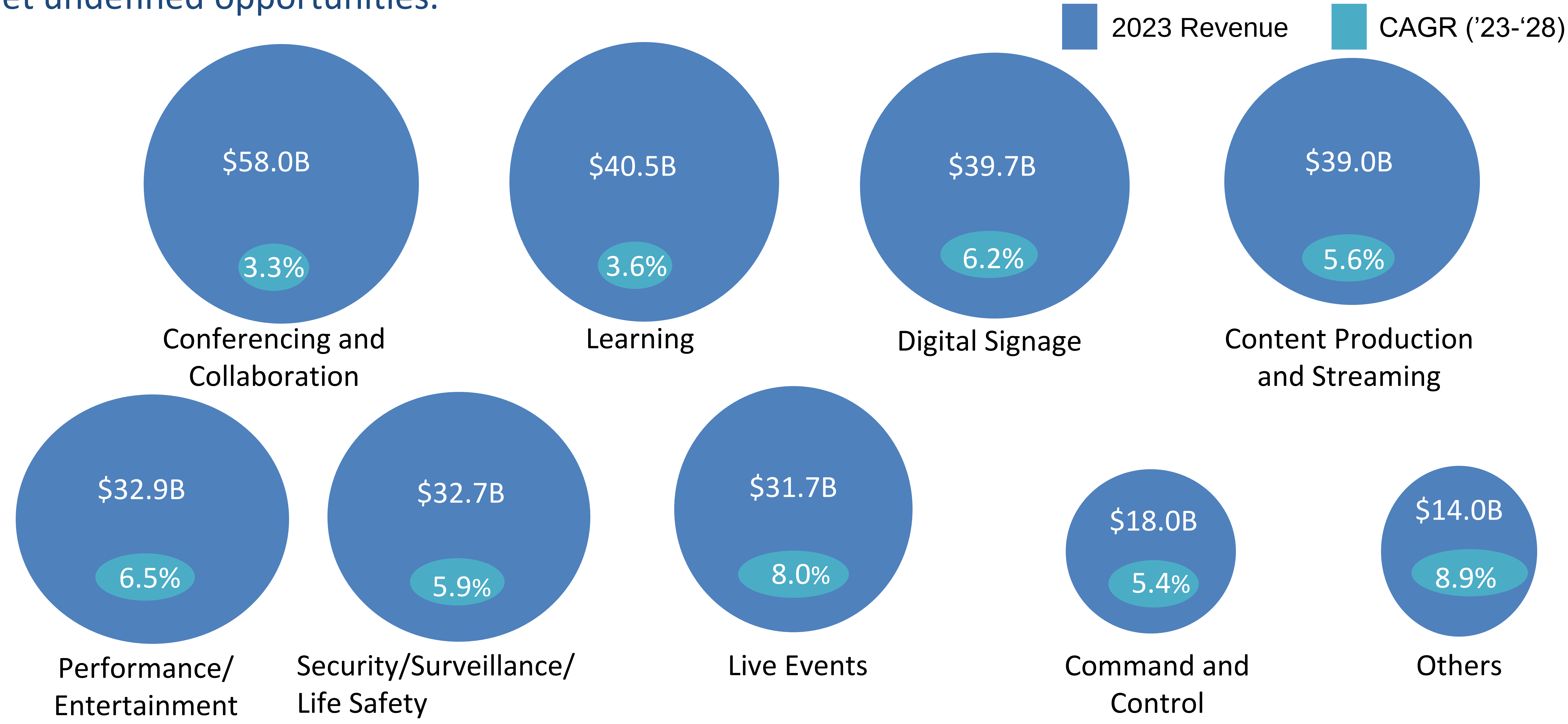
Though cloud or on-premise content management are important to streaming and collaboration, the two areas differ from there. Streaming needs more cameras, conferencing relies on audio.

Learning is further differentiated by its emphasis on video technologies, whether projection for scalability of size or displays for proliferation throughout a facility.



Post pandemic, the highest growth comes from the unknown.

While conferencing and collaboration and learning will remain the largest, and recovery continues for events and entertainment, it is in ‘other’ that growth is highest. This reflects the changing landscape of AV and the as-yet undefined opportunities.



ISE 2023

integrated systems europe

Facts & Figures

integrated systems europe

A joint venture partnership of AVIXA CEDIA

Key Metrics

Integrated Systems Europe is the World's largest AV and systems integration tradeshow. The 2023 edition took place at Fira de Barcelona Gran Via, Spain, on 31 January – 3 February and occupied six halls (Halls 2, 3, 5, 6, 7 and 8.0) as well as Congress Square. The information in this Facts and Figures document comes from the ISE delegate registration system and post-show surveys of visitors and exhibitors.

Show Floor Summary

56,870m² Stand Space

1,052 Exhibitors

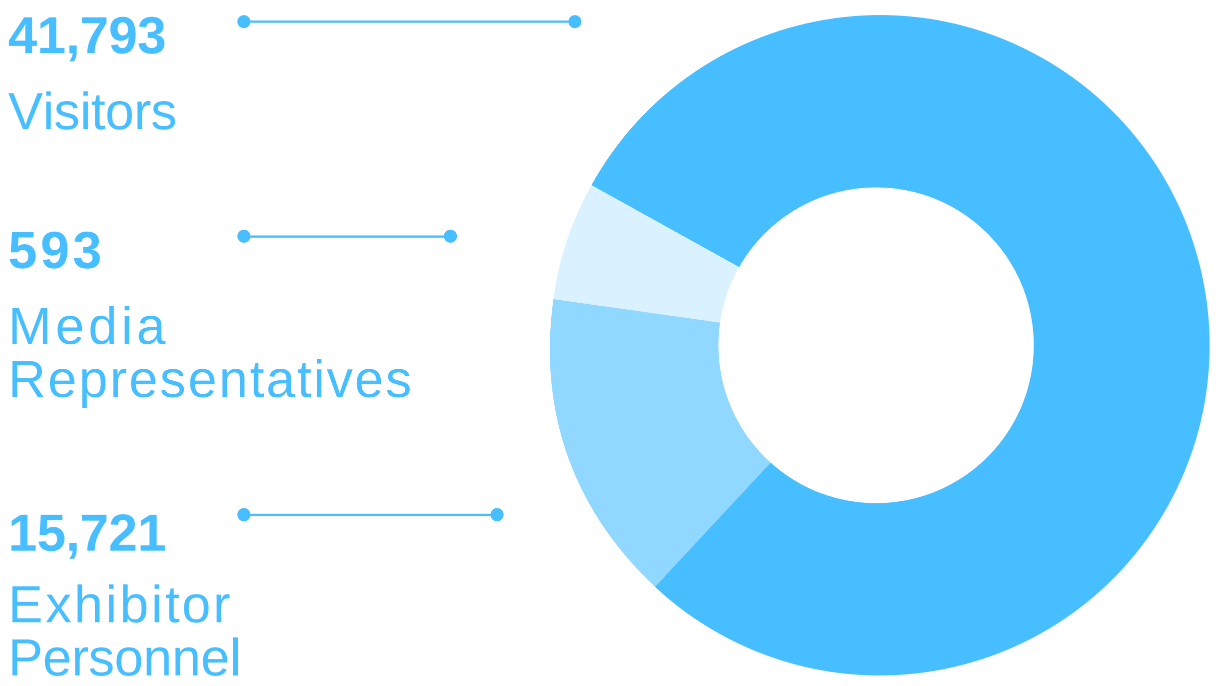
Attendee Summary

58,107 Attendees

15,255 First Time Visitors

Among all attendee groups, **15,255** people (**26.2%**) visited ISE for the first time; **6,355** (**41.6%** of first-time visitors) were from Spain.

(Note: these figures do not include the 4171 registered attendees of IOT Solutions World Congress (IOTSWC) who also visited ISE 2023. IOTSWC ran in Hall 4 during the first three days of ISE. See **page 11** for details.)



Total Visits

126,243 Total Visits

ISE 2023 had a cumulative total of 126,243 visits across the four show days:

	Tuesday 31 January	Wednesday 1 February	Thursday 2 February	Friday 3 February
Attendance per day	33,611	40,628	34,005	17,999
% of total	26.62%	32.18%	26.94%	14.26%

(If the 7459 visits made on Monday 30 January are included, the cumulative total rises to 133,702.)

The Tuesday and Wednesday attendances are the highest ever for those days at any edition of ISE.

On average, visitors spent 2.2 days at ISE 2023.

Attendee Attitudes

	How important was it to attend ISE 2023?	How satisfied are you with ISE 2023?	How likely are you to attend ISE 2024?
Visitors	8.1	8.1	8.3
Exhibitors	8.6	8.0	9.0

These are average scores where 1 = not at all, 10 = extremely

Attendee Profile

Job Title

CEO 15%

C-Suite (CTO/CIO, COO, CFO, CMO) 6.3%

President 2.2 %

Vice President 11 %

Director 14.9 %

Manager 20.9%

Specialist 16.6%

Associate / Analyst 1.8 %

Student / Faculty 5.5%

Other 15.7 %

Attendees by Age

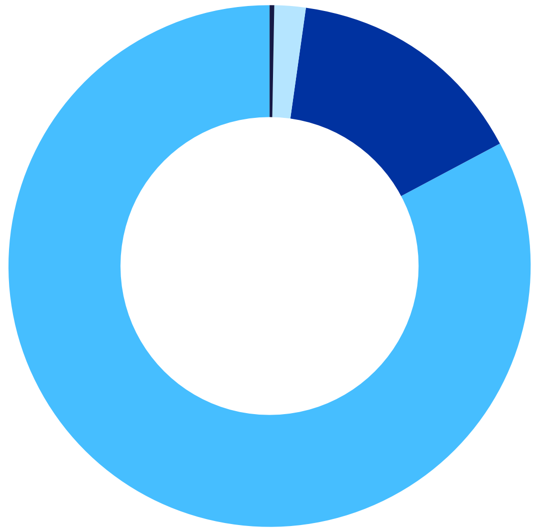
43 Years Median Age

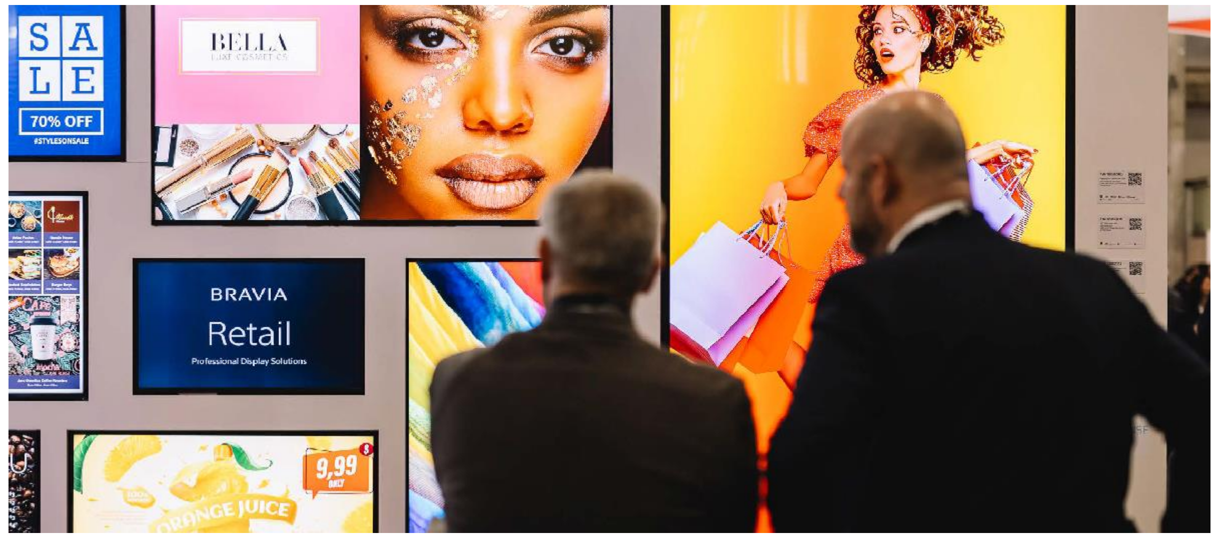
Under 25	25-34	35-44	45-54	55-64	65 and Over
7.2%	16.4%	30.4%	30.0%	14.1%	1.9%

Attendees by Gender

The proportion of ISE attendees identifying as other than male continues to increase slowly.

- 0.5% Non-binary
- 1.9% Prefer not to specify
- 15.0% Female
- 82.6% Male





Attendee Profile

A total of **155 countries were represented** at ISE 2023, with the top 60 countries making up over **98.1%** of the total attendance and the top 30 covering the many of the significant territories.

2023 Ranking	2022 Ranking	Country	Attendee Count	Percentage
1	(1)	Spain	18,254	31.68%
2	(2)	United Kingdom	5,961	10.35%
3	(3)	Germany	4,162	7.22%
4	(4)	France	3,243	5.63%
5	(5)	Italy	2,796	4.85%
6	(6)	Netherlands	2,096	3.64%
7	(7)	United States of America	1,942	3.37%
8	(25)	China	1,319	2.29%
9	(8)	Belgium	1,113	1.93%
10	(10)	Switzerland	965	1.68%
11	(11)	Sweden	900	1.56%
12	(13)	Poland	889	1.54%
13	(14)	Portugal	850	1.48%
14	(9)	Norway	710	1.23%
15	(12)	Denmark	696	1.21%
16	(15)	Israel	693	1.20%
17	(16)	Austria	608	1.06%
18	(17)	South Korea	605	1.05%
19	(20)	United Arab Emirates	535	0.93%
20	(21)	Turkey	533	0.93%
21	(18)	Finland	533	0.93%
22	(19)	Czech Republic	436	0.76%
23	(28)	India	410	0.71%
24	(24)	Romania	374	0.65%
25	(23)	Ireland	372	0.65%
26	(22)	Hungary	369	0.64%
27	(42=)	Chinese Taipei	368	0.64%
28	(26)	Canada	354	0.61%
29	(29)	Greece	294	0.51%
30	(27)	Saudi Arabia	264	0.46%

2023 Ranking	2022 Ranking	Country	Attendee Count	Percentage
31	(47=)	Japan	224	0.39%
32	(42=)	Australia	216	0.37%
33	(40)	Brazil	209	0.36%
34	(41)	Serbia	207	0.36%
35	(30)	Slovakia	183	0.32%
36	(32=)	Mexico	180	0.31%
37	(55)	Singapore	168	0.29%
38	(50)	Russia	164	0.28%
39	(36)	Morocco	154	0.27%
40	(34)	Lithuania	153	0.27%
41	(31)	Egypt	144	0.25%
42	(32=)	Croatia	143	0.25%
43	(37)	Slovenia	140	0.24%
44	(39)	Latvia	130	0.23%
45	(38)	South Africa	129	0.22%
46	(35)	Estonia	127	0.22%
47	(44)	Bulgaria	124	0.22%
48	(45)	Qatar	123	0.21%
49	-	Hong Kong	110	0.19%
50	(49=)	Cyprus	104	0.18%
51	(47)	Kazakhstan	103	0.18%
52	(46)	Luxembourg	90	0.16%
53	-	Malaysia	83	0.14%
54	-	Thailand	79	0.14%
55	(60=)	Indonesia	75	0.13%
56	(54)	Malta	73	0.13%
57	(58)	Colombia	65	0.11%
58	(52=)	Ukraine	64	0.11%
59	(51)	Iceland	57	0.10%
60	-	Georgia	54	0.09%

Business Focus

The Technologies that Attendees are Looking For

This table highlights the broad spectrum of technologies specified to be of interest to ISE channel and end-user attendees.

The technologies are arranged here into broad groupings that roughly reflect the Technology Zones on the ISE show floor.

Technology	Proportion of channel attendees	Proportion of end-user attendees
Audio		
Audio Systems & Acoustics	52.02%	40.47%
Audio Processing	40.30%	30.53%
Audio Guiding & Interpretation	19.27%	19.40%
Content Production & Distribution		
IP & Network Distribution	33.12%	21.06%
Streaming Media	24.94%	25.55%
Media Distribution	23.16%	19.81%
VR / AR / Mixed Realities	20.81%	25.22%
Image Processing	19.42%	19.64%
Content Creation & Management	17.40%	18.59%
Digital Signage & DooH		
Digital Signage	46.99%	28.76%
Interactive Display	30.95%	21.32%
Large-Scale Display	28.51%	18.27%
Digital Cinema	21.51%	20.91%
Lighting & Staging		
Lighting & Lighting Control	28.29%	24.80%
Show Control	14.46%	13.35%
Rigging & Staging	11.94%	13.53%

Technology	Proportion of channel attendees	Proportion of end-user attendees
Multi-Technology		
Control Systems	42.95%	26.98%
Video Projection & Display	38.35%	34.63%
Projection Screens	31.56%	25.36%
Cabling, Connectors & Signal Management	34.07%	22.19%
Wireless Communication	31.09%	23.54%
Furniture, Racks, Cases & Mounts	20.43%	12.51%
Residential & Smart Building		
Home Automation	23.77%	11.72%
Home Cinema	22.63%	13.42%
Smart Building	22.62%	13.97%
Building Management	19.40%	13.47%
Security & Access Control	15.13%	9.29%
Energy Management	13.64%	9.81%
HVAC Control	11.01%	5.27%
Power Conditioning & Management	10.46%	6.63%
Paging and Evacuation Systems	8.56%	3.32%
Unified Communications & Education Technology		
Conferencing & Collaboration	36.69%	23.03%
Presentation Systems	26.59%	18.23%
Education Technology	22.94%	18.02%
Unified Communications & Collaboration	19.60%	10.14%

Business Focus

Sectors Served by Channel Attendees

These are the market sectors for which channel attendees provide solutions or systems.

Proportion of channel attendees	Sector
Corporate Offices / Collaboration Spaces	54.10%
Auditoriums / Theatres / Entertainment Venues	44.92%
Classrooms or Learning Spaces	38.93%
Retail Sales Floor / Kiosks	35.29%
Restaurants / Dining Facilities	34.24%
Museums / Themed Attractions	19.94%
Stadiums or Sports Arenas	18.60%
Audio / Video Production Rooms For Broadcast	18.24%
Control Rooms For Monitoring Production, Output, Or Security	15.66%
Waiting Areas / Lobbies	15.74%
Guest Rooms In Hotels or Similar Facilities	13.24%
Individual Homes	12.55%
Houses Of Worship	12.52%
Train Stations / Airports / Other Travel Hubs	11.17%
Multi-Household Residences	8.12%
Casinos / Arcades	7.52%
Examination or Patient Procedure Rooms (Medical)	6.25%
Cruise Ships	6.19%
Superyachts	5.54%

Top 10 End-User Sectors

As a complement to the previous table, these are the most popular market sectors in which our end-user attendees work.

> Retail sales floor / kiosks

> Corporate offices / Collaboration spaces

> Auditoriums / Theatres / Entertainment venues

> Audio / video production rooms for broadcast

> Museums / Themed attractions

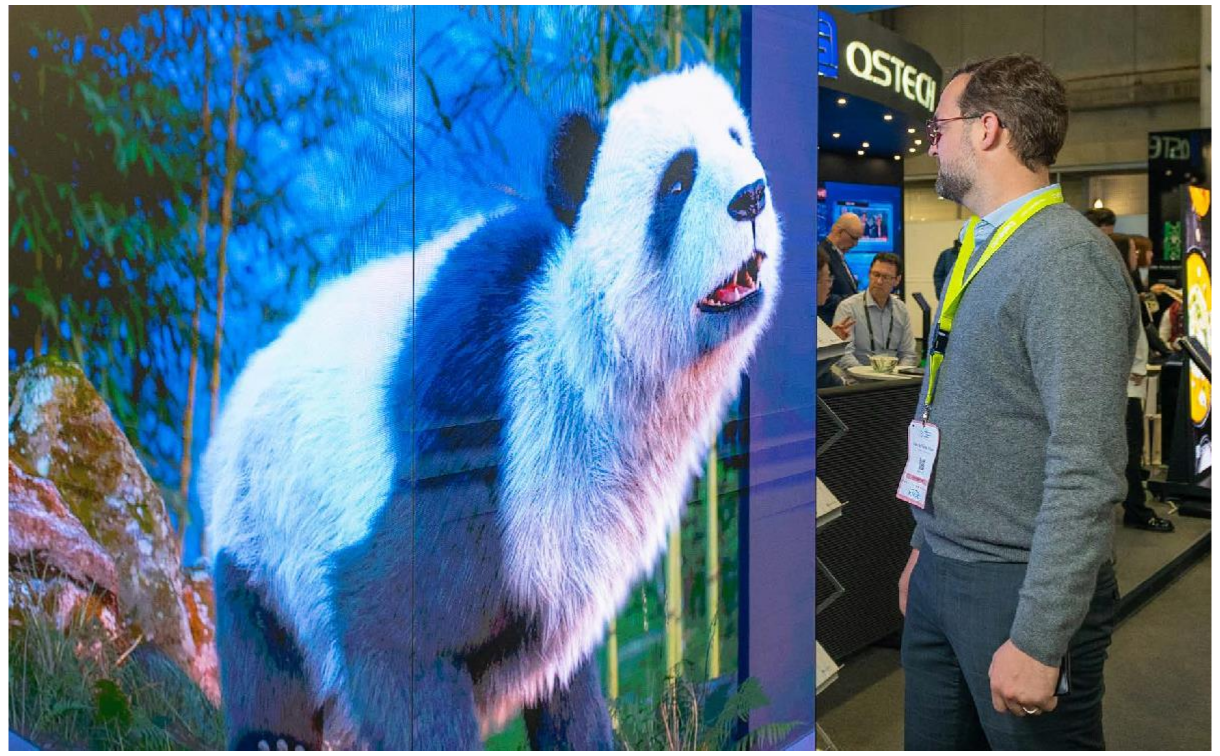
> Classrooms or learning spaces

> Stadiums or sports arenas

> Restaurants / Dining facilities

> Waiting areas / lobbies

> Control rooms for monitoring production, output, or security



ISE 2024

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