FACTS & FIGURES

INTEGRATED SYSTEMS EUROPE 2018

FULL ATTENDANCE DATA AND
AUDIENCE DEMOGRAPHICS

WWW.ISEUROPE.ORG

6-9 February 2018
Amsterdam, RAI, NL

Integrated Systems Europe

A JOINT VENTURE
PARTNERSHIP OF

AVIXA   CEDIA

Integrated Systems Europe is the world's largest AV and systems integration tradeshow. The 2018 edition took place at the RAI Amsterdam, The Netherlands, on 6-9 February.

The information included in the Facts and Figures document is generated by the ISE delegate registration system and post-show surveys undertaken with attendees and exhibitors.

Please feel free to contact us regarding the content of this document should you have any questions.

ATTENDEE SUMMARY

The number of registered attendees to ISE 2018 increased by 10.2 %, up from 73,413 in 2017. This figure includes exhibitor personnel and visitors. New attendees accounted for 38 % (not including any exhibitor personnel) of the total and there were 294 first-time exhibitors.

NUMBER OF REGISTERED ATTENDEES: 80,923

EXHIBITOR PERSONNEL: **20,207**
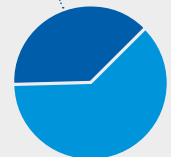
ATTENDEES: **59,098**

OTHER (PRESS / VIP / SPEAKERS): **1,618**

NUMBER OF NEW ATTENDEES: 22,393

38 % NEW ATTENDEES

TOTAL: **59,098**

62 % PREVIOUS ISE ATTENDEES

NUMBER OF EXHIBITORS: 1,296
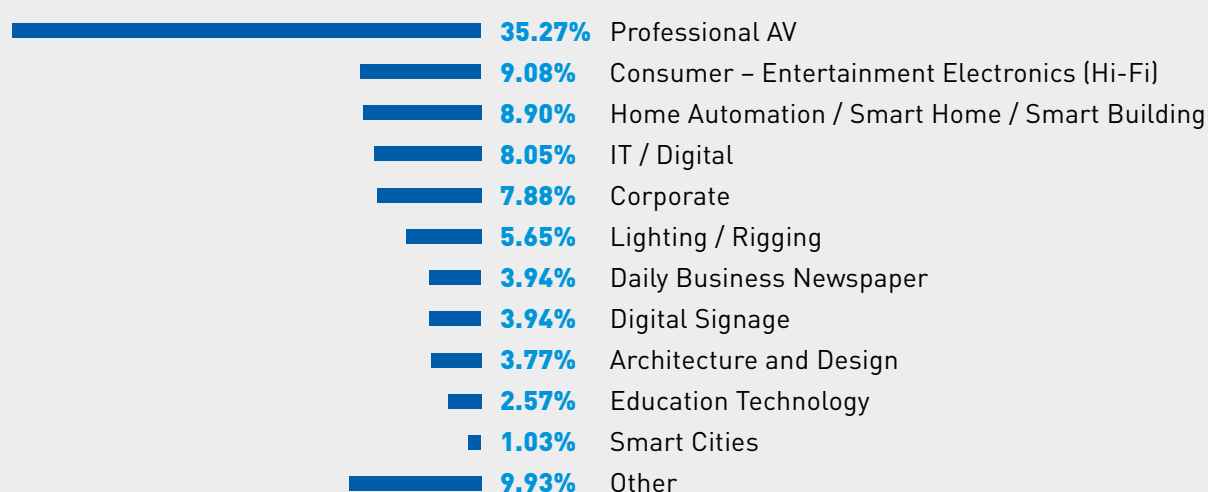
NEW EXHIBITORS: **294**

CO-EXHIBITORS: **220**

FLOOR SPACE NET SQUARE METERS: 53,313

MEDIA

International media editors and journalists attended ISE 2018 from 44 countries from a wide range of print, digital and broadcast brands.

NUMBER OF MEDIA: **586**

MEDIA BRANDS PRIMARY FOCUS %

%	Focus
35.27%	Professional AV
9.08%	Consumer – Entertainment Electronics (Hi-Fi)
8.90%	Home Automation / Smart Home / Smart Building
8.05%	IT / Digital
7.88%	Corporate
5.65%	Lighting / Rigging
3.94%	Daily Business Newspaper
3.94%	Digital Signage
3.77%	Architecture and Design
2.57%	Education Technology
1.03%	Smart Cities
9.93%	Other

Media by Country	Count	%
United Kingdom	133	22,70%
Germany	112	19,11%
Netherlands	83	14,16%
United States	51	8,70%
France	35	5,97%
Italy	30	5,12%
Poland	16	2,73%
Russian Federation	14	2,39%
Spain	13	2,22%
Belgium	11	1,88%
Czech Republic	7	1,19%
Denmark	7	1,19%
Hungary	6	1,02%
Afghanistan	4	0,68%
China	4	0,68%

Media by Country	Count	%
Iran, Islamic Republic of	4	0,68%
Israel	4	0,68%
Malta	4	0,68%
Sweden	4	0,68%
Bosnia and Herzegovina	3	0,51%
Hong Kong	3	0,51%
Norway	3	0,51%
Singapore	3	0,51%
Austria	3	0,51%
Greece	2	0,34%
Guinea	2	0,34%
India	2	0,34%
Lebanon	2	0,34%
Pakistan	2	0,34%

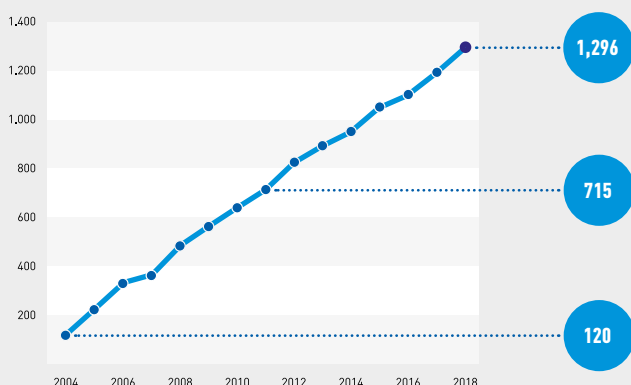| Media by Country	Count	%
Serbia	2	0,34%
Slovakia	2	0,34%
South Africa	2	0,34%
Switzerland	2	0,34%
Australia	1	0,17%
Canada	1	0,17%
Ghana	1	0,17%
Ireland	1	0,17%
Japan	1	0,17%
Malaysia	1	0,17%
Morocco	1	0,17%
Philippines	1	0,17%
Portugal	1	0,17%
Slovenia	1	0,17%
Taiwan	1	0,17%

YEAR ON YEAR GROWTH

These graphs demonstrate the continued growth of ISE across three primary indicators: Number of Exhibitors (+8.6 % v. 2017). Number of Attendees (+10.2 % v. 2017) and Total Net Floor Space Sold (+7 % v. 2017). This is broadly in line with the show's long term development over 15 successive editions.
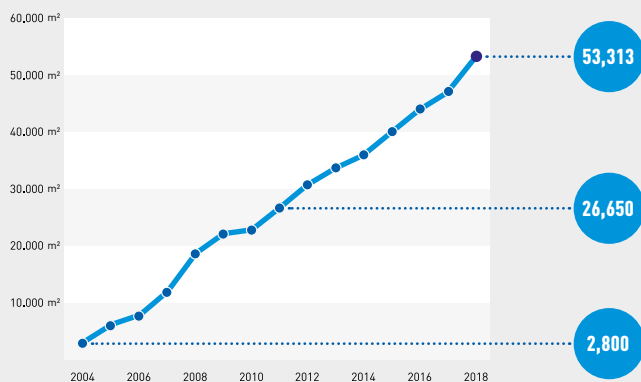
NUMBER OF ATTENDEES

80,923
34,870
3,489

NUMBER OF EXHIBITORS

1,296
715
120

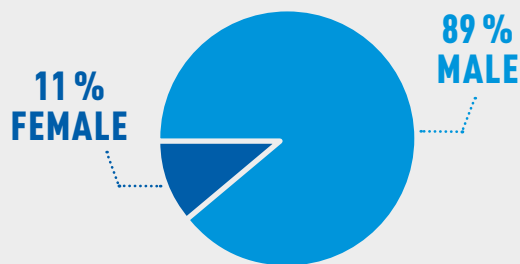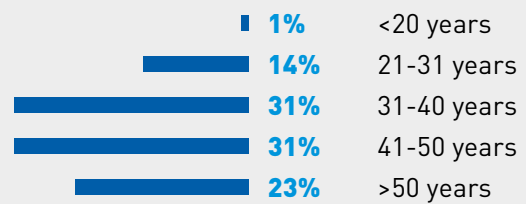## NET FLOOR SPACE

53,313
26,650
2,800
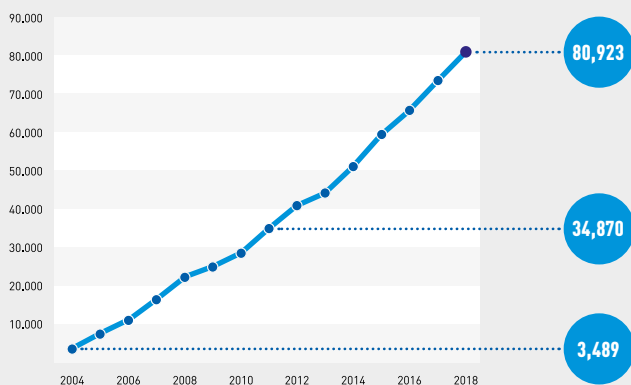
ATTENDEE DEMOGRAPHICS

Visitors to ISE 2018 were predominantly male with the proportion of women attending in line with the 2017 edition. Attendees were largely drawn from Management and Senior Management positions, with the vast majority aged under 50 years.
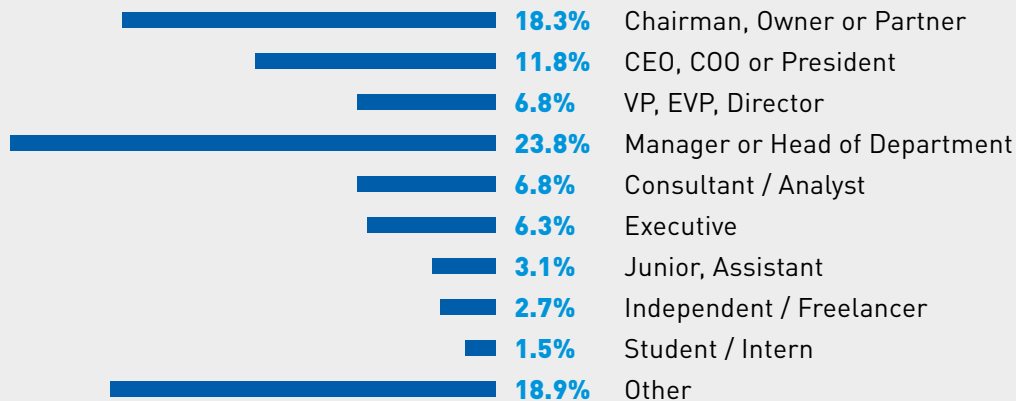
BY GENDER

11 % FEMALE

89 % MALE

BY AGE

1%	<20 years
14%	21-31 years
31%	31-40 years
31%	41-50 years
23%	>50 years

JOB DESCRIPTION

|	
18.3%	Chairman, Owner or Partner
11.8%	CEO, COO or President
6.8%	VP, EVP, Director
23.8%	Manager or Head of Department
6.8%	Consultant / Analyst
6.3%	Executive
3.1%	Junior, Assistant
2.7%	Independent / Freelancer
1.5%	Student / Intern
18.9%	Other

AV CHANNEL AND END-CUSTOMER CLASSIFICATION

ISE 2018 classified all attendees by their primary area of business focus. These comprise the AV 'channel' and 'end-customer' segments. This table excludes all ISE 2018 exhibitors. ISE is seeing an annual increase in the number of end-customers attending the show.

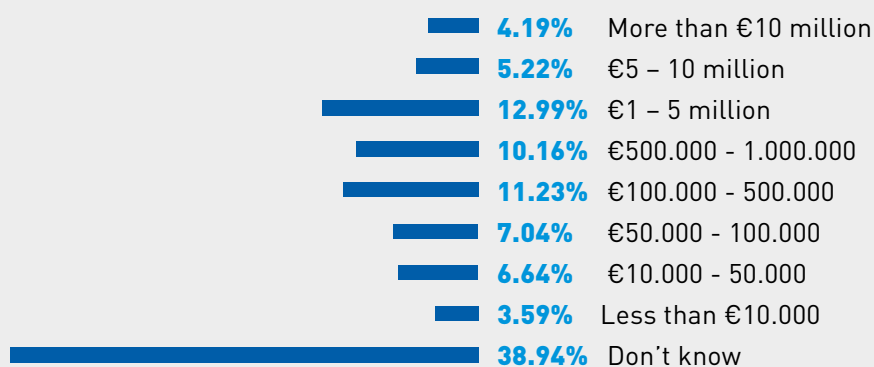| Profile	All	First Time
Systems integrator or installer	25.95 %	21.93 %
Dealer or distributor of AV products/solutions	22.06 %	18.50 %
Manufacturer of AV products/solutions	14.98 %	14.73 %
User or end-customer of AV products/solutions	10.81 %	14.04 %
Technology or business consultancy	9.78 %	11.17 %
Live events, conference and meetings production	9.60 %	10.76 %
Other	6.82 %	8.87 %

ATTENDEES BY PURCHASING AUTHORITY

78 % of ISE 2018 attendees reported that they could recommend or authorise purchases – broadly in line with 2017 figures.

22.0 %
INFLUENCE PURCHASE
OR HAVE NO INFLUENCE

48.0 %
AUTHORISE
PURCHASE

30.0 %
RECOMMEND
PURCHASE
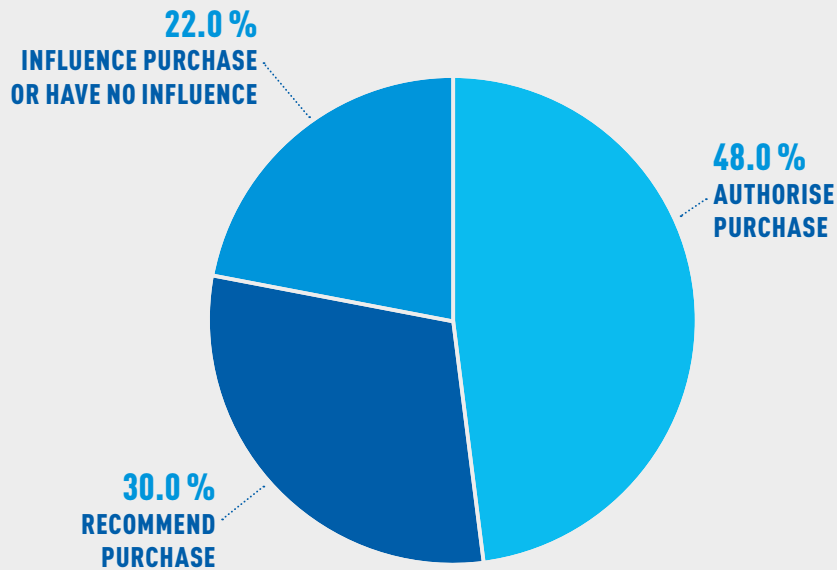
ATTENDEES BY SPENDING POWER

Almost 33 % of attendees to ISE 2018 were able to authorise or recommend expenditure of over € 1,000,000 per annum. Only 4 % of attendees authorise expenditure of less than € 10,000.

4.19%	More than €10 million
5.22%	€5 – 10 million
12.99%	€1 – 5 million
10.16%	€500.000 - 1.000.000
11.23%	€100.000 - 500.000
7.04%	€50.000 - 100.000
6.64%	€10.000 - 50.000
3.59%	Less than €10.000
38.94%	Don't know

ATTENDEES BY COUNTRY

The following table shows attendees by country of origin. In total, 97 % of attendees came from 67 countries (those with over 60 attendees) with the highest representation from The Netherlands, Germany and the UK.

ALL ATTENDEE COUNTRY SPLIT	2018	2017	Diff
Netherlands	17440	16629	4,88 %
Germany	9519	8596	10,74 %
United Kingdom	9490	8821	7,58 %
Belgium	4029	3733	7,93 %
France	3945	3626	8,80 %
Italy	2850	2821	1,03 %
China	2696	1975	36,51 %
United States	2666	2333	14,27 %
Spain	1987	1801	10,33 %
Russian Federation	1500	1230	21,95 %
Switzerland	1400	1285	8,95 %
Sweden	1297	1200	8,08 %
Korea, Republic of	1256	1147	9,50 %
Poland	1124	1119	0,45 %
Turkey	1029	828	24,28 %
Denmark	1005	958	4,91 %
Norway	1005	872	15,25 %
Israel	792	790	0,25 %
Austria	752	685	9,78 %
India	722	576	25,35 %
Taiwan	661	541	22,18 %
United Arab Emirates	650	611	6,38 %
Japan	642	551	16,52 %
Finland	636	658	-3,34 %
Czech Republic	578	573	0,87 %
Portugal	554	512	8,20 %
Hungary	475	389	22,11 %
Ireland	463	441	4,99 %
Canada	462	347	33,14 %
Romania	389	284	36,97 %
Ukraine	326	260	25,38 %
Saudi Arabia	289	289	0,00 %
Singapore	268	190	41,05 %

ALL ATTENDEE COUNTRY SPLIT	2018	2017	Diff
Hong Kong	260	191	36,13 %
Slovakia	252	236	6,78 %
Australia	250	230	8,70 %
Morocco	231	180	28,33 %
Greece	230	218	5,50 %
South Africa	203	202	0,50 %
Serbia	169	131	29,01 %
Luxembourg	163	167	-2,40 %
Slovenia	163	115	41,74 %
Iran, Islamic Republic of	161	154	4,55 %
Egypt	155	130	19,23 %
Lithuania	151	119	26,89 %
Brazil	149	139	7,19 %
Croatia	149	162	-8,02 %
Estonia	149	148	0,68 %
Qatar	146	111	31,53 %
Latvia	144	127	13,39 %
Indonesia	134	78	71,79 %
Bulgaria	133	126	5,56 %
Jordan	122	88	38,64 %
Thailand	120	124	-3,23 %
Lebanon	114	111	2,70 %
Belarus	108	71	52,11 %
Malaysia	106	53	100,00 %
Kazakhstan	99	111	-10,81 %
Cyprus	97	91	6,59 %
Mexico	94	53	77,36 %
Nigeria	80	80	0,00 %
Pakistan	76	63	20,63 %
Kuwait	75	92	-18,48 %
Iceland	72	55	30,91 %
Malta	62	70	-11,43 %
Other	1391	2716	-48,78 %
Total	**80,923**	**73,413**	**10,20 %**

NEW ATTENDEES BY COUNTRY

Below, we present a graphic showing the origin of first-time ISE attendees. First-time attendees (excluding exhibitor personnel) represent 38% of the total number of visitors to the show.
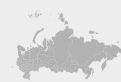
23.26 %
NETHERLANDS (5,208)

10.75 %
GERMANY (2,407)

9.53 %
UNITED KINGDOM (2,134)

5.20 %
BELGIUM (1,165)

5.14 %
FRANCE (1,152)

3.92 %
ITALY (878)

2.73 %
SPAIN (611)

2.67 %
RUSSIAN FEDERATION (597)

1.85 %
UNITED STATES (415)

1.84 %
CHINA (413)

33.10 %
OTHER (7,413)

CHANNEL VISITORS BY TECHNOLOGIES SPECIFIED

This table highlights the broad spectrum of technologies specified to be of interest to ISE 'channel' attendees. The channel is broadly defined by ISE as the following types of attendee: distributor; manufacturer; meeting and events solution provider; systems integrator and installer; consultant.

Market Sector	
Audio Guiding & Interpretation	17.44 %
Audio Processing	30.55 %
Audio Systems & Acoustics	44.51 %
Building Management	16.38 %
Cabling, Connectors & Signal Management	28.87 %
Conferencing & Collaboration	27.87 %
Content Creation & Management	15.04 %
Control Systems	36.64 %
Digital Cinema	19.00 %
Digital Signage	43.07 %
Education Technology	16.29 %
Energy Management	9.56 %

Market Sector	
Furniture, Racks, Cases & Mounts	14.93 %
Home Automation	22.67 %
Home Cinema	20.41 %
HVAC Control	9.38 %
Image Processing	17.04 %
Interactive Display	27.99 %
IP & Network Distribution	28.79 %
Large-Scale Display	25.67 %
Lighting & Lighting Control	27.28 %
Media Distribution	22.43 %
Paging and Evacuation Systems	6.63 %
Power Conditioning & Management	7.98 %

Market Sector	
Presentation Systems	27.45 %
Projection Screens	32.08 %
Rigging & Staging	10.96 %
Security & Access Control	14.49 %v
Show Control	14.15 %
Streaming Media	26.11 %
Video Projection & Display	40.54 %
VR / AR / Mixed Realties	17.86 %
Wireless Communication	31.17 %
Other	1.11 %

CHANNEL VISITORS BY MARKETS SERVED

Attendees from the AV 'channel' at ISE 2018 provide technologies and solutions within a wide range of vertical market sectors. The table below shows attendees who have specified in which sectors they operate.

Market Sector	
Agriculture	3.18%
Architecture	15.04%
Automotive	12.56%
Banking and Finance	20.98%
Bars, Restaurants and Nightclubs	21.04%
Cinema	25.47%
Command and Control Rooms	15.51%
Construction	14.55%
Content Creation	7.99%
Corporate	33.61%

Market Sector	
Education	29.56%
Energy Production	5.83%
Government	24.24%
Home Automation	18.29%
Home Cinema	17.30%
Hotels and Leisure Resorts	26.51%
Information Technology	20.30%
Live Events	23.57%
Marine	6.52%
Medical and Healthcare	15.90%
Meeting and Presentation Rooms	24.79%

Market Sector	
Military and Police	10.36%
Museum and Visitor Attractions	17.52%
Outdoor Advertising	13.47%
Places of Worship	9.58%
Retail and Leisure Venues	19.26%
Simulation and Visualisation	9.30%
Sports Stadia and Arenas	16.43%
Theatres and Performance Venues	20.07%
Transport Facilities	8.19%
TV and Broadcast	20.27%
Other	2.55%

END-CUSTOMER VISITORS BY MARKET SECTOR

ISE 2018 drew a wide cross section (almost 11% of the total) of 'end-customer' attendees to the show. As in last year's edition end-customers are a growing proportion of ISE's overall attendee demographics. This table illustrates in which market sectors the end-customers operate.

Market Sector	
Agriculture	1.71%
Architecture	5.08%
Automotive	5.42%
Banking and Finance	7.51%
Bars, Restaurants and Nightclubs	6.74%
Cinema	8.93%
Command and Control Rooms	3.23%
Construction	5.42%
Content Creation	5.53%
Corporate	12.76%
Education	19.76%
Energy Production	2.77%
Government	10.09%
Home Automation	3.39%
Home Cinema	3.93%
Hotels and Leisure Resorts	6.93%

Market Sector	
Information Technology	10.99%
Live Events	15.07%
Marine	1.66%
Medical and Healthcare	6.32%
Meeting and Presentation Rooms	7.87%
Military and Police	1.79%
Museum and Visitor Attractions	6.58%
Outdoor Advertising	6.85%
Places of Worship	1.40%
Retail and Leisure Venues	9.48%
Simulation and Visualisation	4.33%
Sports Stadia and Arenas	4.41%
Theatres and Performance Venues	9.88%
Transport Facilities	4.05%
TV and Broadcast	12.87%
Other	6.11%

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