

# FACTS & FIGURES

INTEGRATED SYSTEMS EUROPE 2019

FULL ATTENDANCE DATA AND  
AUDIENCE DEMOGRAPHICS

[WWW.ISEUROPE.ORG](http://WWW.ISEUROPE.ORG)

5-8 February 2019  
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 2019 edition took place at the RAI Amsterdam, The Netherlands, on 5-8 February.

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

# ATTENDEE SUMMARY

The number of registered attendees to ISE 2019 increased to 81,268. This figure includes exhibitor personnel and visitors. New attendees accounted for 32.4% (not including any exhibitor personnel) of the total and there were 225 first-time exhibitors.

**NUMBER OF REGISTERED ATTENDEES: 81,268**

**EXHIBITOR PERSONNEL: 20,082**

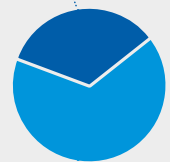
**ATTENDEES: 59,887**

**OTHER (PRESS / VIP / SPEAKERS): 1,299**

**NUMBER OF NEW ATTENDEES: 26,387**

**32.4% NEW ATTENDEES**

**TOTAL: 59,887**



**67.6% PREVIOUS ISE ATTENDEES**

**NUMBER OF EXHIBITORS: 1,301**

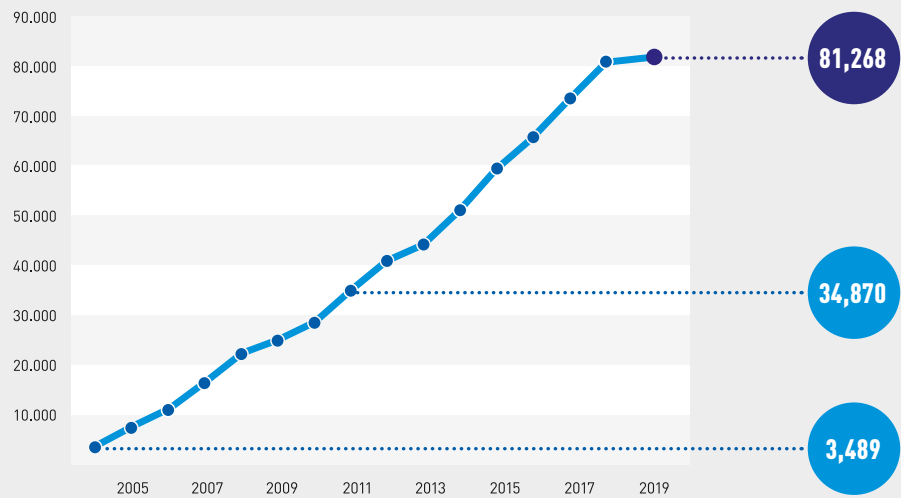
**NEW EXHIBITORS: 225**

**CO-EXHIBITORS: 278**

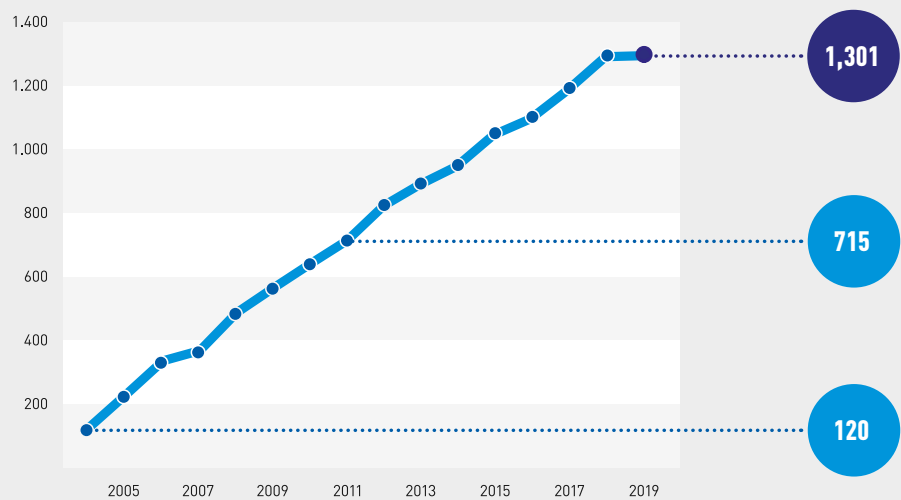
# YEAR ON YEAR GROWTH

As previously reported, ISE is at capacity at RAI Amsterdam. We work closely with the venue each year to add additional floor space. A further 2,787 square metres of exhibit space was added for ISE 2019.

## NUMBER OF ATTENDEES

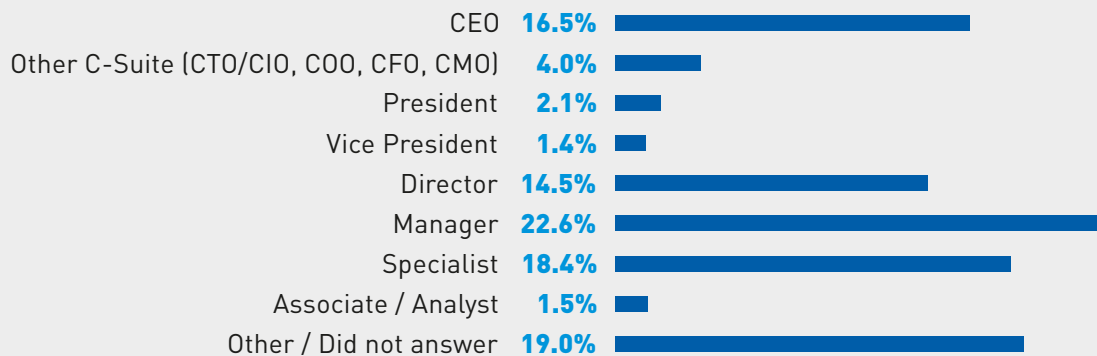


## NUMBER OF EXHIBITORS



# WHO ARE OUR ATTENDEES?

## JOB TITLE



## ATTENDEES BY PURCHASING AUTHORITY

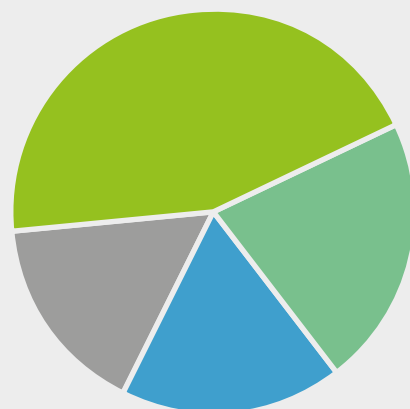
More than eight out of ten ISE attendees (83.9%) reported that they either made the final purchasing decision, influenced the decision or made recommendations for it. (ISE 2019 exhibitors are excluded from these figures.)

**44.7%** AUTHORISE PURCHASE  
(RESPONSIBLE FOR FINAL DECISION)

**21.5%** RECOMMEND SPECIFIC  
PRODUCTS OR TECHNOLOGIES

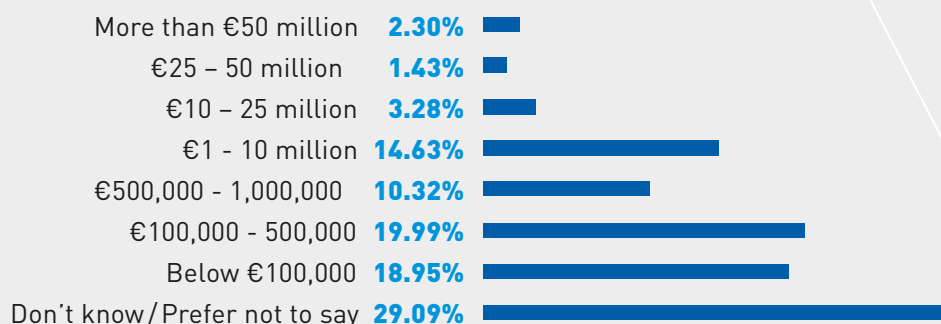
**17.7%** INFLUENCE PURCHASE (BUT DO NOT  
MAKE SPECIFIC RECOMMENDATIONS)

**16.1%** NO INFLUENCE / PREFER NOT TO SAY



## ATTENDEES BY SPENDING POWER

More than a fifth of attendees (21.64%) to ISE 2019 told us they can authorise or recommend expenditure of over €1,000,000 per annum. (ISE 2019 exhibitors are excluded from these figures.)



## BUSINESS FOCUS: AV CHANNEL OR AV USER?

ISE 2019 classified all attendees by their primary area of business focus. ISE is seeing an annual increase in the number of non-channel attendees at the show. (ISE 2019 exhibitors are excluded from this table.)

Total Attendees	All Attendees (59,887)	First time Attendees (26,387)
<b>Channel</b>	<b>%</b>	<b>%</b>
Integrator/Installer	27.34%	22.24%
Distributor/Reseller	24.51%	22.39%
Manufacturer	15.17%	15.06%
Live Events Producer	7.18%	8.23%
Consultant	6.03%	5.80%
Software Developer/Programmer	3.88%	4.80%
Design Firm	2.38%	3.22%
UX/CX Developer	0.26%	0.34%
<b>Total Channel</b>	<b>86.75%</b>	<b>82.08%</b>
<b>End-User</b>	<b>%</b>	<b>%</b>
User or Purchaser of AV Solutions and Products	8.78%	11.82%
Creative Agency/Artist	2.75%	3.90%
Meeting/Event Planner	1.72%	2.20%
<b>Total End-User</b>	<b>13.25%</b>	<b>17.92%</b>

Please note that this section has been recategorised for 2019, so care should be taken when making comparisons with previous years.

## MARKET FOCUS



## ATTENDEES BY GENDER

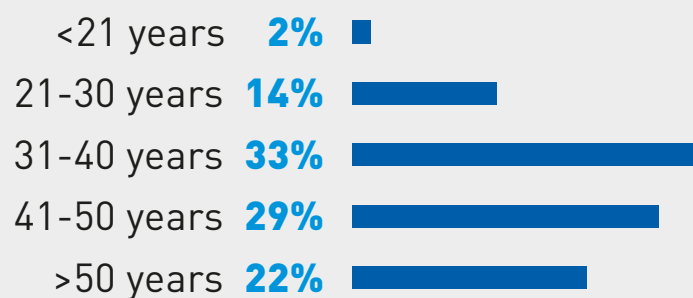
**13% FEMALE**  
(11% IN 2018)

**87% MALE**  
(89% IN 2018)



## ATTENDEES BY AGE

The median age of ISE attendees is the early 40s.



# WHERE DO OUR ATTENDEES COME FROM?

The following table shows attendees by country of origin. A total of 188 countries were represented at ISE 2019, with the top 60 countries (each of which had 100 or more attendees) making up 97.5% of the total attendance. As in 2018, the highest representation came from The Netherlands, Germany and the UK.

2019 #	2018 #	All attendee country split	Registered Attendees	Proportion of Total	2019 #	2018 #	All attendee country split	Registered Attendees	Proportion of Total
1	(1)	Netherlands	17,383	23.09%	31	(32)	Saudi Arabia	367	0.49%
2	(2)	Germany	8,452	11.23%	32	(31)	Ukraine	364	0.48%
3	(3)	United Kingdom	8,390	11.14%	33	(36)	Australia	311	0.41%
4	(5)	France	3,759	4.99%	34	(38)	Greece	291	0.39%
5	(4)	Belgium	3,628	4.82%	35	(37)	Morocco	257	0.34%
6	(6)	Italy	2,838	3.77%	36	(44)	Egypt	231	0.31%
7	(8)	United States of America	2,655	3.53%	37	(35)	Slovakia	223	0.30%
8	(7)	China	2,437	3.24%	38	(39)	South Africa	220	0.29%
9	(9)	Spain	1,997	2.65%	39	(41)	Luxembourg	204	0.27%
10	(10)	Russian Federation	1,828	2.43%	40	(47)	Croatia	200	0.27%
11	(11)	Switzerland	1,351	1.79%	41	(40)	Serbia	175	0.23%
12	(12)	Sweden	1,236	1.64%	42	(33)	Singapore	172	0.23%
13	(14)	Poland	1,110	1.47%	43	(52)	Bulgaria	171	0.23%
14	(17)	Norway	1,006	1.34%	44	(48)	Estonia	170	0.23%
15	(16)	Denmark	939	1.25%	45	(59)	Cyprus	168	0.22%
16	(15)	Turkey	873	1.16%	46	(45)	Lithuania	168	0.22%
17	(18)	Israel	857	1.14%	47	(43)	Qatar	168	0.22%
18	(20)	India	708	0.94%	48	(51)	Indonesia	159	0.21%
19	(19)	Austria	692	0.92%	49	(42)	Slovenia	159	0.21%
20	(24)	Finland	667	0.89%	50	(50)	Latvia	156	0.21%
21	(25)	Czech Republic	620	0.82%	51	(34)	Hong Kong	155	0.21%
22	(22)	United Arab Emirates	616	0.82%	52	(46)	Brazil	153	0.20%
23	(26)	Portugal	587	0.78%	53	(43)	Islamic Republic of Iran	152	0.20%
24	(13)	Republic of Korea	522	0.69%	54	(62)	Pakistan	146	0.19%
25	(27)	Hungary	486	0.65%	55	(60)	Mexico	144	0.19%
26	(21)	Taiwan	478	0.63%	56	(55)	Lebanon	142	0.19%
27	(28)	Ireland	461	0.61%	57	(61)	Nigeria	121	0.16%
28	(29)	Canada	444	0.59%	58	(58)	Kazakhstan	113	0.15%
29	(23)	Japan	438	0.58%	59	(53)	Jordan	101	0.13%
30	(30)	Romania	434	0.58%	60	(56)	Belarus	100	0.13%

# WHAT CHANNEL ATTENDEES ARE LOOKING FOR

This table highlights the broad spectrum of technologies specified to be of interest to ISE 'channel' attendees. See page 5 for the types of company included within the definition of 'channel'. Total number of channel attendees (excluding exhibitors): 47,600

Technology	Proportion of channel attendees	Technology	Proportion of channel attendees	Technology	Proportion of channel attendees
Audio Systems	44.92%	Presentation Systems	22.67%	Education	15.46%
Digital Signage	39.57%	Large Scale Display	22.16%	Image Processing	14.83%
Video Projection	35.50%	Streaming Media	21.93%	Furniture	14.55%
Control Systems	30.77%	Home Automation	20.09%	Security	12.07%
Audio Processing	29.57%	Media Distribution	19.12%	Show Control	11.56%
Conferencing	28.51%	VR/AR	17.89%	Rigging Staging	9.66%
Signal Management	26.33%	Building Management	17.47%	Energy Management	8.47%
Projection Screens	24.79%	Audio Guiding	17.21%	HVAC Control	7.44%
Networks	24.69%	Home Cinema	16.65%	Power Conditioning	6.79%
Interactive Display	24.55%	Media Distribution	22.43%	Paging Evacuation	5.49%
Wireless Communication	23.97%	Content Creation	16.53%	Other	1.90%
Lighting	23.96%	Digital Cinema	16.33%		

# MARKETS SERVED BY CHANNEL VISITORS

Attendees from the AV 'channel' at ISE 2019 provide technologies and solutions within a wide range of vertical market sectors. The table below shows those attendees who specified the sectors in which they operate.

Technology	Proportion of channel attendees	Technology	Proportion of channel attendees
Offices	38.59%	Control Rooms	15.97%
Auditoriums	30.43%	Homes	15.00%
Retail	28.61%	Houses of Worship	14.40%
Classrooms	25.20%	Guest Rooms	13.70%
Restaurants	22.09%	Travel Hubs	12.33%
Stadiums	21.62%	Residences	9.29%
Museums	19.09%	Casinos	6.99%
AV Production Rooms	18.41%	Cruise Ships	6.78%
Lobbies	17.92%	Medical	6.08%



# END-CUSTOMER VISITORS

End-customer attendees are a growing proportion of ISE's overall demographics ( See page 5 for the types of company included within the definition of end-user ).

This table illustrates in which areas our end-customers operate:

Areas	%
Offices	28.73 %
Classrooms	25.24 %
Auditoriums	24.91 %
AV Production Rooms	15.19 %
Retail	13.27 %
Lobbies	11.73 %
Restaurants	10.14 %
Control Rooms	9.17 %
Stadiums	8.74 %
Museums	8.07 %
Guest Rooms	6.28 %
Homes	5.69 %
Houses of Worship	4.96 %
Travel Hubs	4.62 %
Residences	3.08 %
Medical	2.70 %
Cruise Ships	2.20 %
Casinos	2.05 %

# PROFESSIONAL DEVELOPMENT

## CONFERENCES

A total of 10 Conferences, the most ever held at ISE, took place at the Hotel Okura and the RAI.

- **300 Expert Speakers**
- **1,300 Attendees**



## MAIN STAGE

Located in Hall 8, this large, specially designed stage area hosted content from AVIXA, CEDIA, ISE and AV Magazine.

- **41 Sessions**
- **76 Expert Speakers**
- **1,350 Attendees**



## AVIXA

In addition to two of the Conferences above, AVIXA hosted a full programme of 20-minute FlashTrack sessions on its stand.

- **44 FlashTracks**
- **32 Expert Presenters**

## CEDIA

CEDIA hosted a full four-day training programme of 60-minute, 90-minute and half-day sessions, including all-day Home Cinema Design Masterclass. It also presented CEDIA Talks on its stand.

- **42 Training Sessions**
- **26 Expert Presenters**
- **10 CEDIA Talks**

## KEYNOTES

The RAI Forum was the setting for two lively and thought-provoking presentations that bookended ISE 2019:

- The Opening Address from master projection designer Bart Kresa
- The Closing Keynote from Satore Studio creative director Tupac Martir

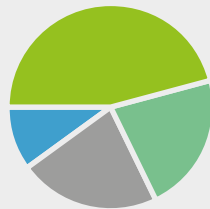
# MEDIA

A total of 520 international media editors and journalists from 36 countries attended ISE 2019, representing a wide range of print, digital and broadcast brands.

**NUMBER OF MEDIA: 520**

## MARKETS COVERED

- 46% Commercial
- 22% Commercial & Residential
- 22% Not disclosed
- 10% Residential



## SPECIFIC MARKET SECTORS COVERED

Corporate (49.6%)	<b>258</b>	
Live Events (38.3%)	<b>199</b>	
Education (34.8%)	<b>181</b>	
Retail (33.7%)	<b>175</b>	
Hospitality (23.4%)	<b>122</b>	
Healthcare (20.6%)	<b>107</b>	

# MEDIA BY COUNTRY

Media by Country	Count	%
United Kingdom	125	24.0%
Germany	84	16.2%
Netherlands	78	15.0%
United States	65	12.5%
Italy	29	5.6%
France	26	5.0%
Poland	14	2.7%
Russian Federation	12	2.3%
Spain	12	2.3%

Media by Country	Count	%
Belgium	7	1.3%
Czech Republic	6	1.2%
Hungary	4	0.8%
Sweden	4	0.8%
China	3	0.6%
Denmark	3	0.6%
India	3	0.6%
Norway	3	0.6%

Media representatives from the following countries also attended ISE 2019:

Australia, Austria, Bosnia and Herzegovina, Bulgaria, Canada, Côte d'Ivoire, Ghana, Iran, Israel, Morocco, Pakistan, Republic of Korea, Serbia, Singapore, Slovakia, South Africa, Switzerland, Turkey, Ukraine

# ADDITIONAL KEY NUMBERS

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Attendees and exhibitors at ISE 2019 were asked an additional set of questions, and their responses were incorporated with statistics drawn from the Visit Intelligence lead monitoring system.

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## ATTENDEES

**6,258**  
(10.6%)

Number (and proportion) of attendees staying all four days of the show.

**2.3**  
**DAYS**

Average length of visitor stay.

**92%**

Proportion of attendees who thought that ISE 2019 gave a 'good, very good or excellent' return on investment of their time and money.

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## EXHIBITORS

**95%**

Proportion of exhibitors that will 'probably' or 'definitely' exhibit at ISE 2020.

**8.0**

Likelihood of exhibitors to recommend ISE to a business friend or colleague (0=would not, 10=would definitely).

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