

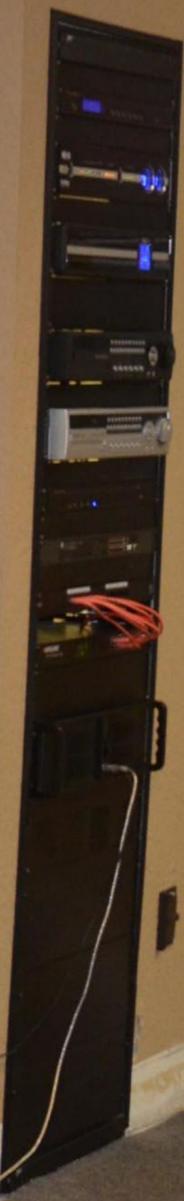


# Control Rooms: A Key Driver of Pro AV Growth

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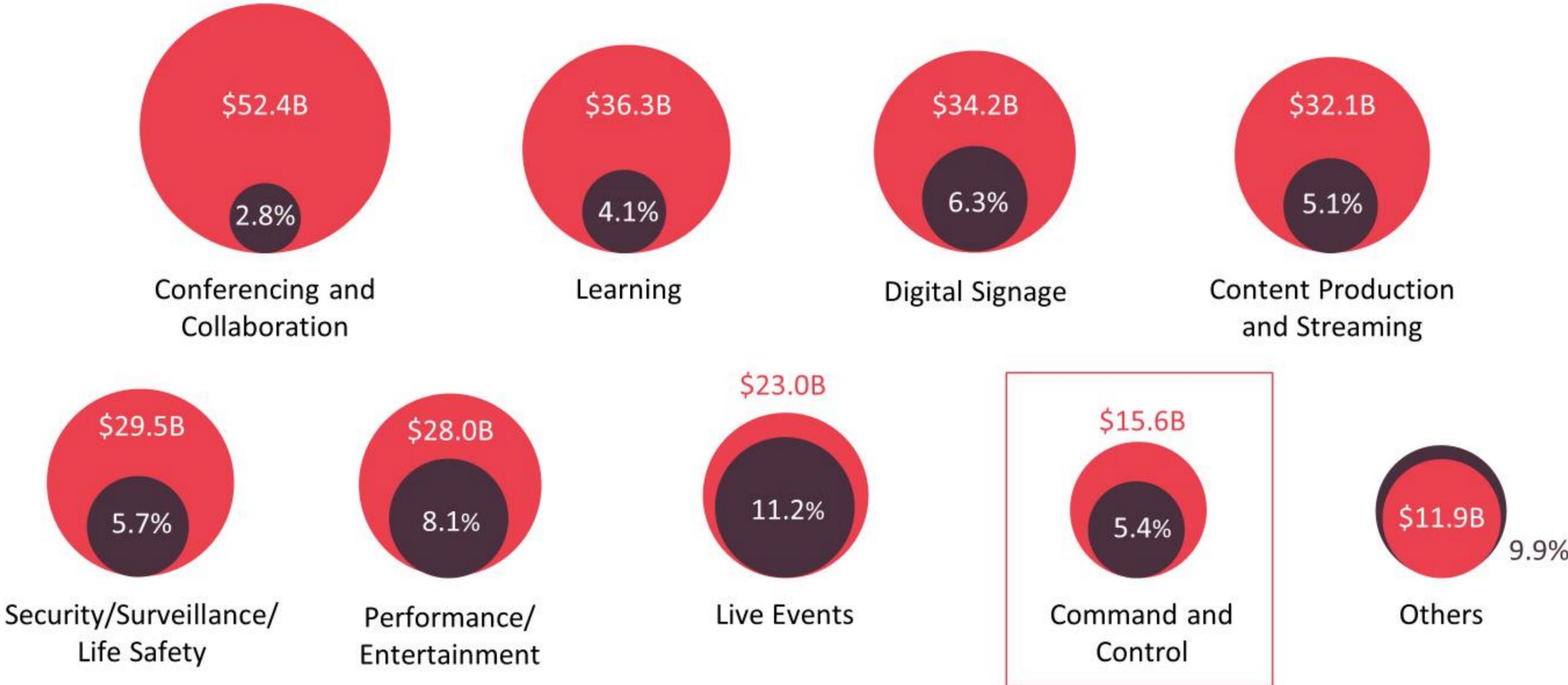
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# Control rooms is a moderate pro AV opportunity with upside.

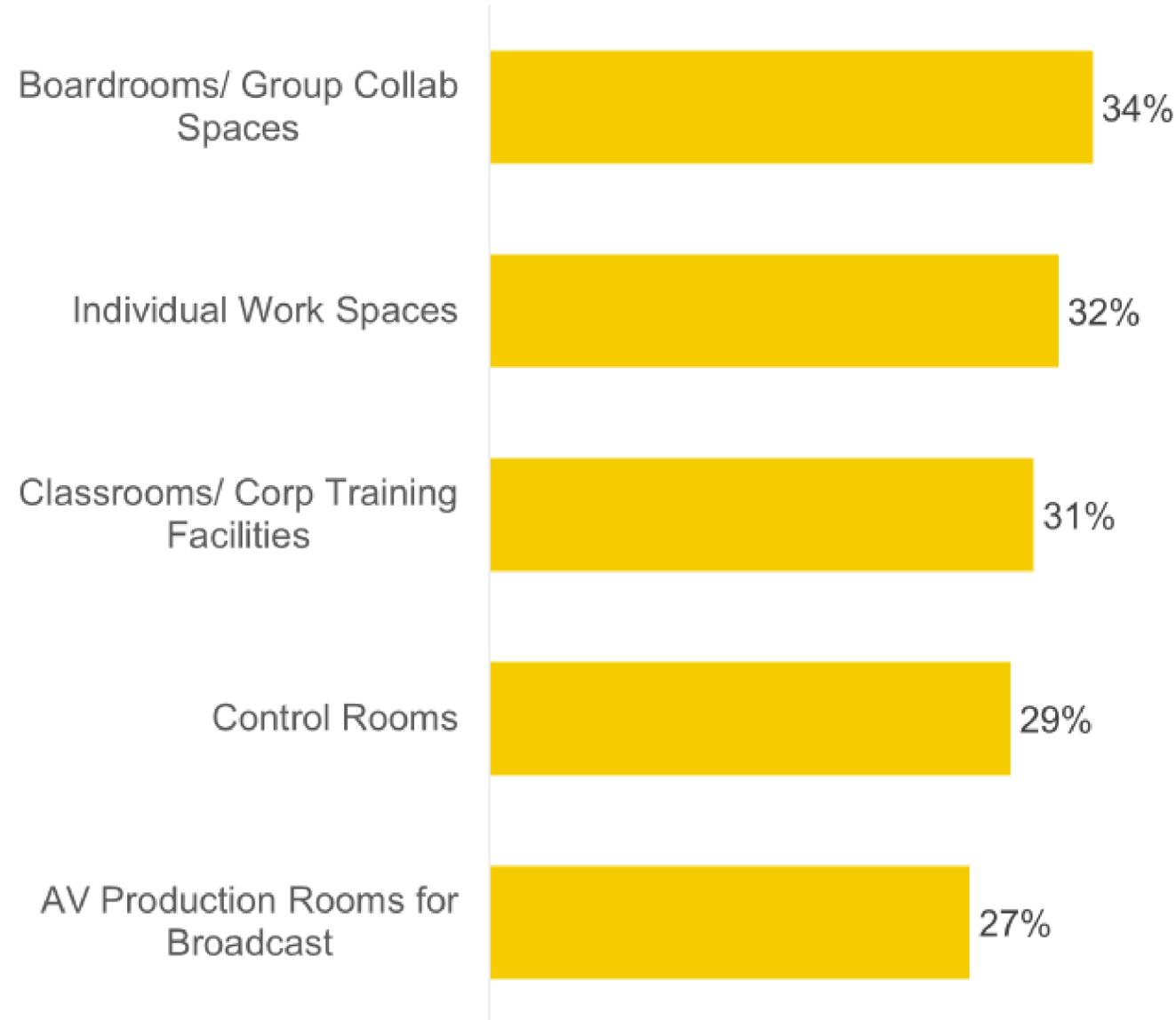
■ 2022 Revenue ■ CAGR ('22 to '27)



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# Control rooms are one of the focus areas for investment.

Top 5 Spaces Targeted for AV Upgrades  
(Q1 2023)



## FINDING:

Though they have slid further down the list, control rooms are still a top area of focus.

## INTERPRETATION:

The definition of a control room is likely changing, moving away from a larger flag-ship install.

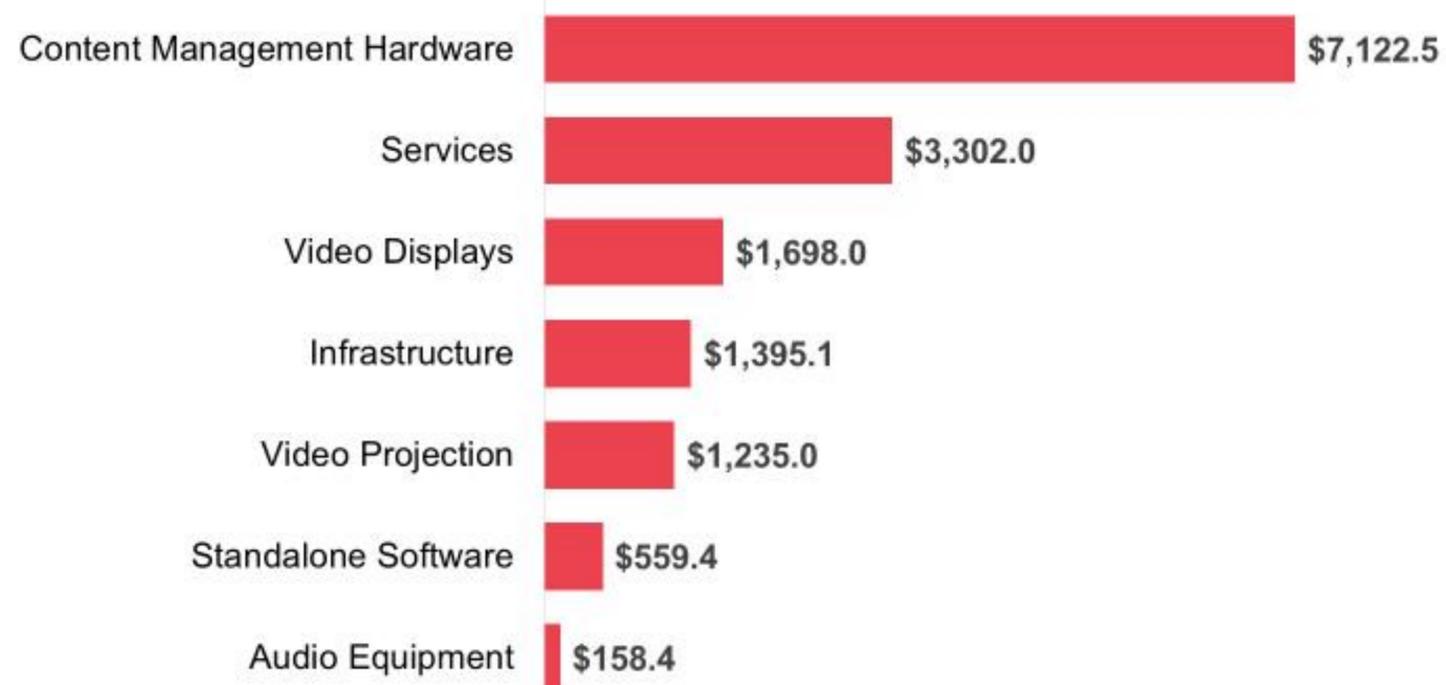
## IMPACT:

Control rooms as a solution area offer increasing opportunity for the market, with potential upside beyond current growth forecasts.



# Control rooms are a complex solution area.

Command and Control  
2022 Revenue (\$M) by Segment



Command and Control solutions revolve around back-end distribution first.

Given the project complexity, the second largest component are services, the channel value-add.

Video displays, in the form of LCD panels and DVLED are third.



# Services represent a fundamental opportunity.



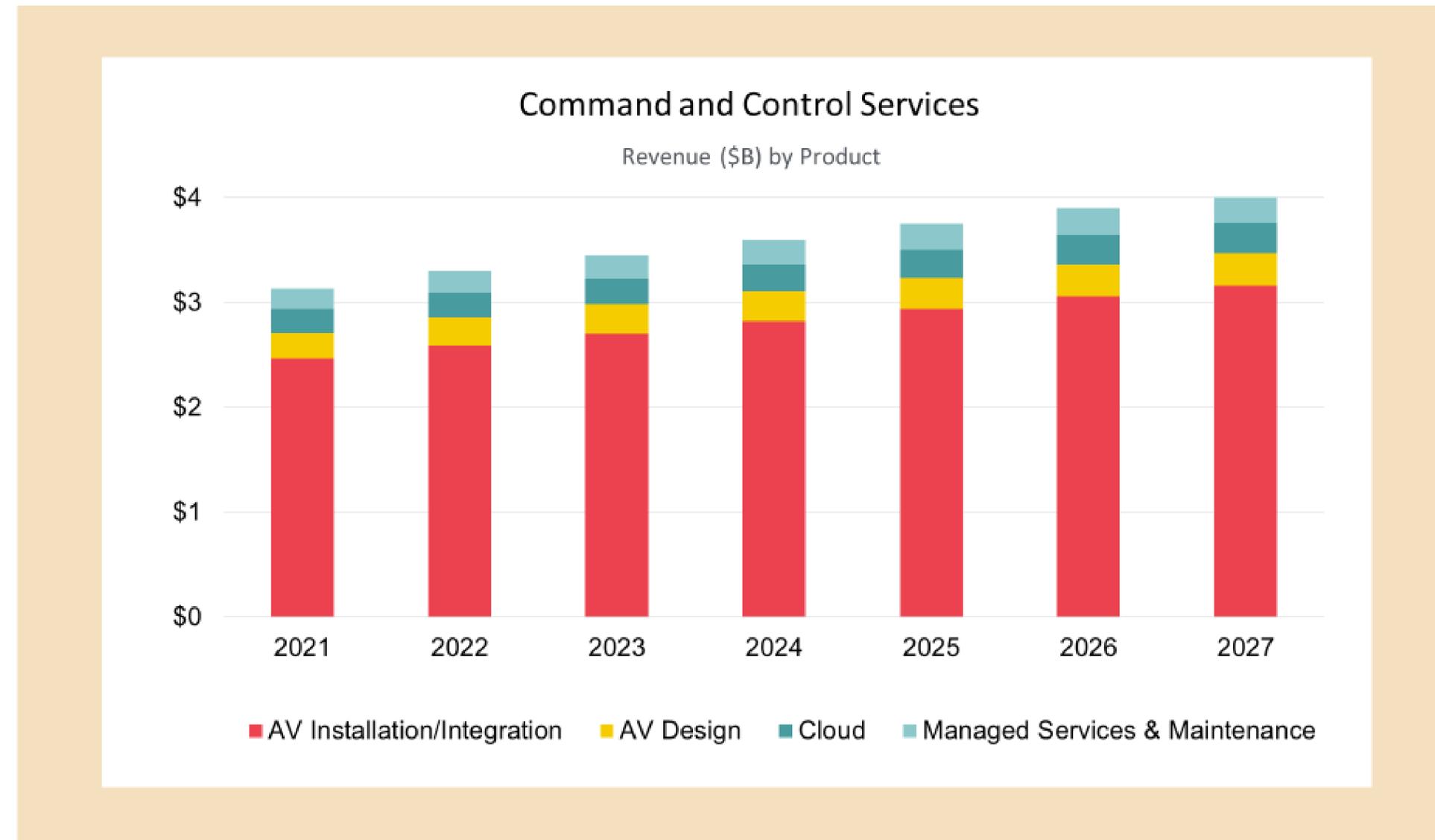
Installation & Integration are the bread and butter.



Design and managed services offer value-add.



Cloud is needed to manage and serve content.





# Questions?

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