

ISE 2023

Facts & Figures

Full attendance data and
audience demographics

A joint venture
partnership of



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

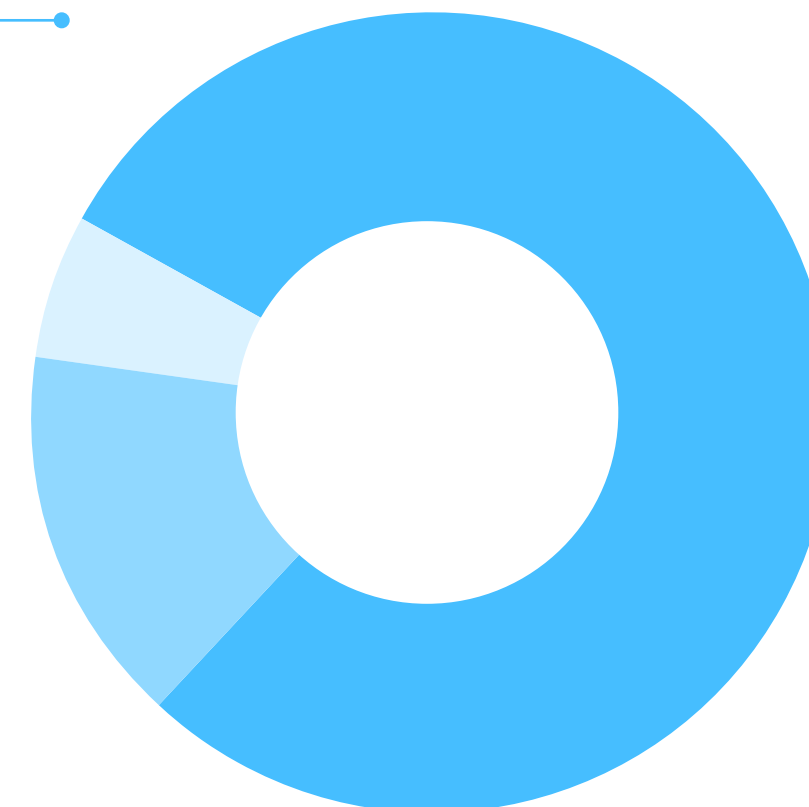
Among all attendee groups, **15,255** people (**26.2%**) visited ISE for the first time; **6,355** (**41.6%** of first-time visitors) were from Spain.

(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.)

41,793 Visitors

593 Media Representatives

15,721 Exhibitor Personnel



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.

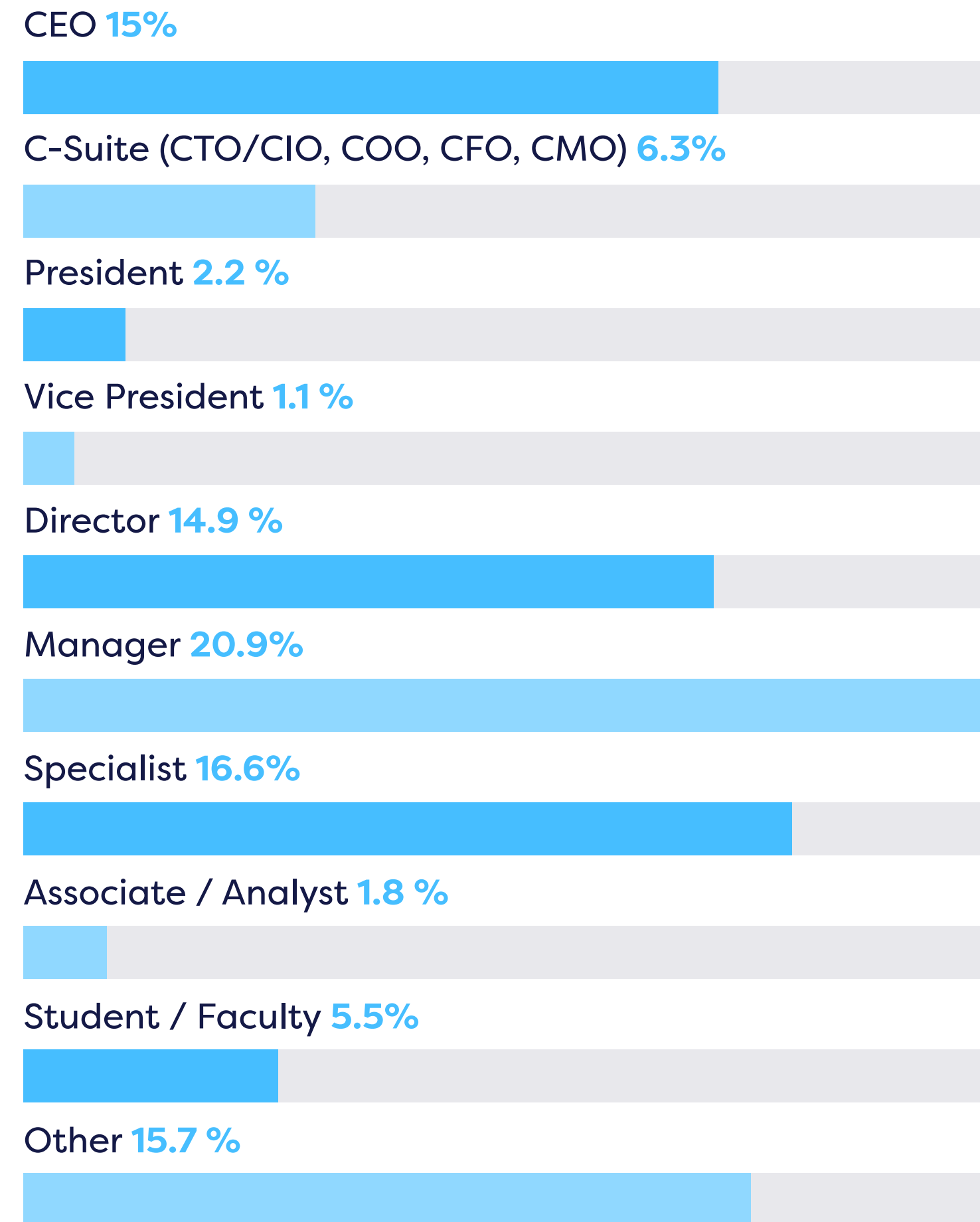
Attendee Attitudes

	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

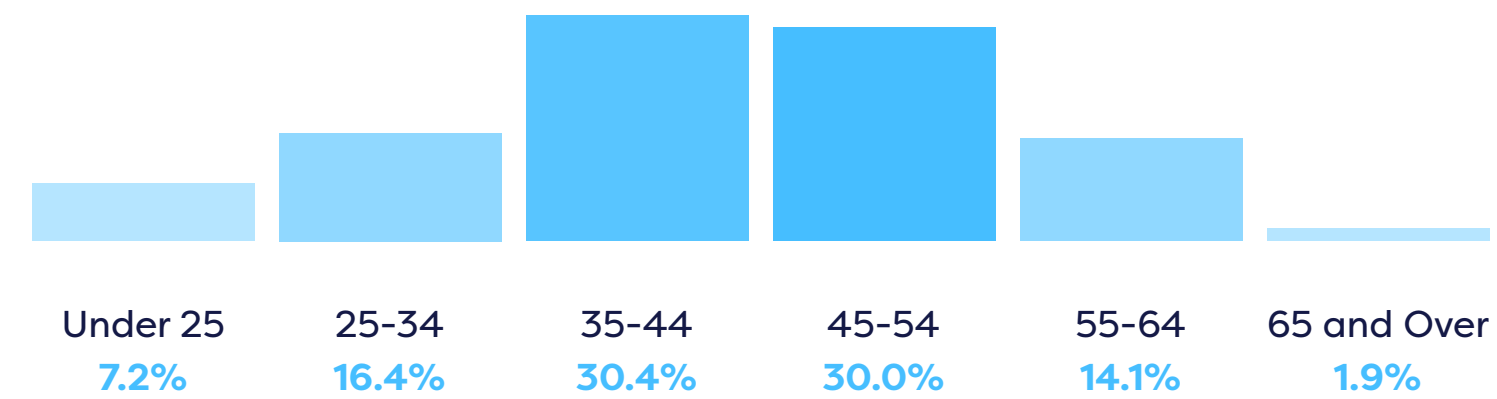
Attendee Profile

Job Title



Attendees by Age

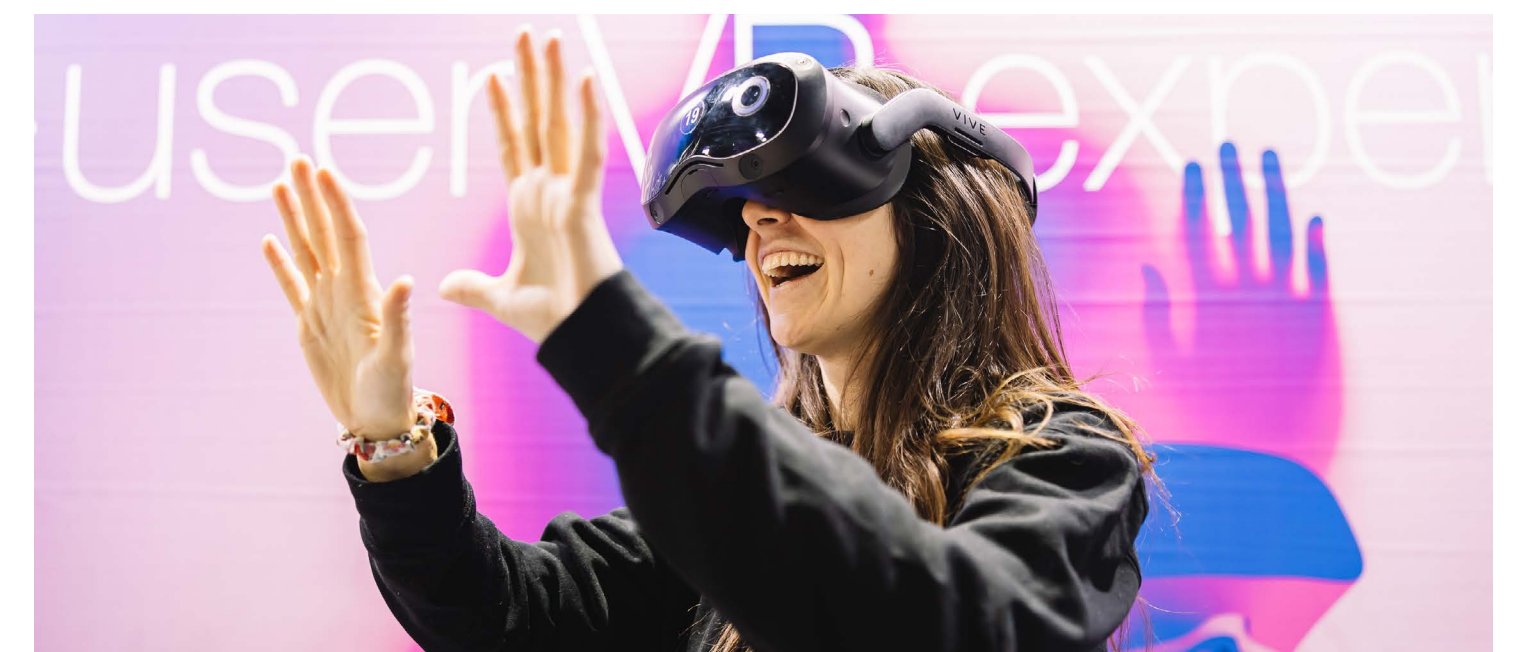
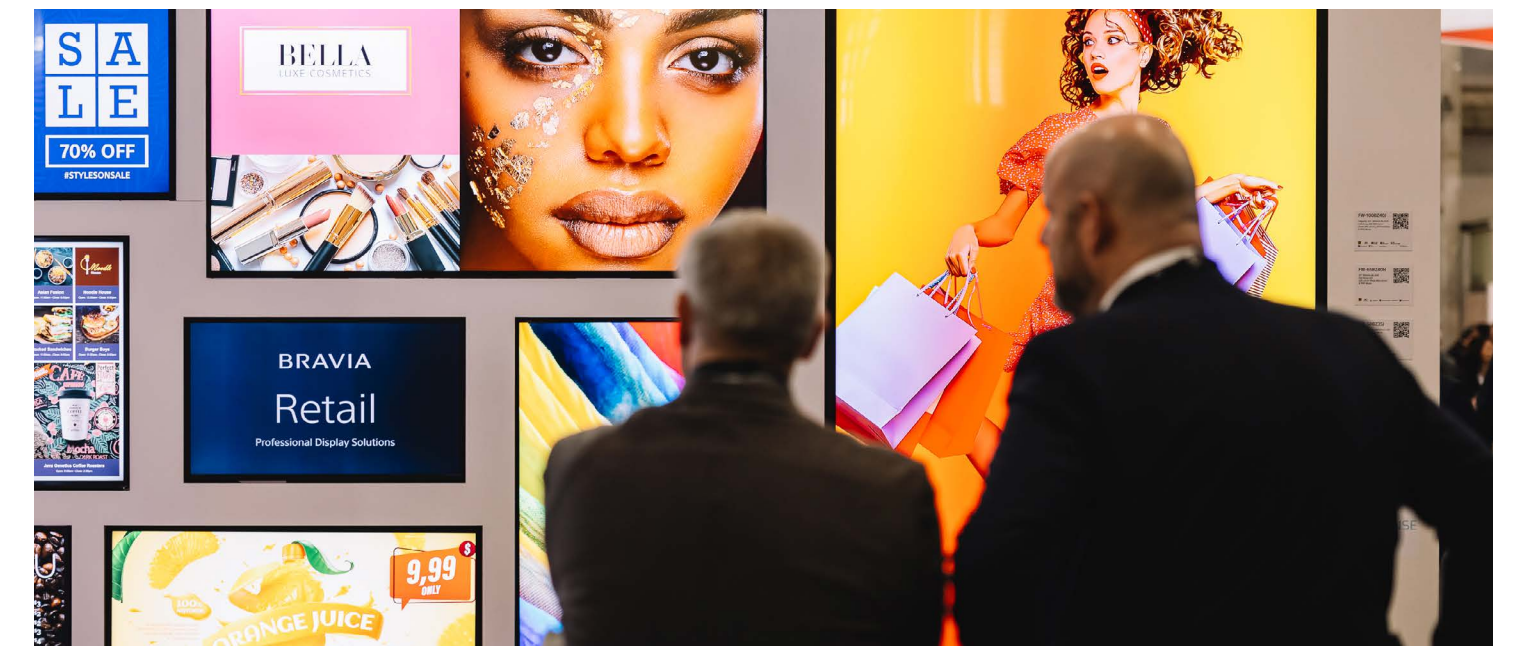
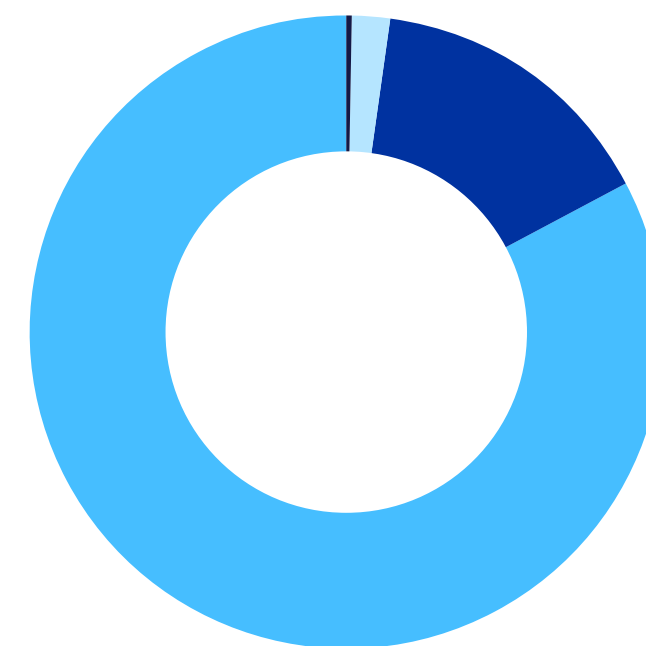
43 Years Median Age



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

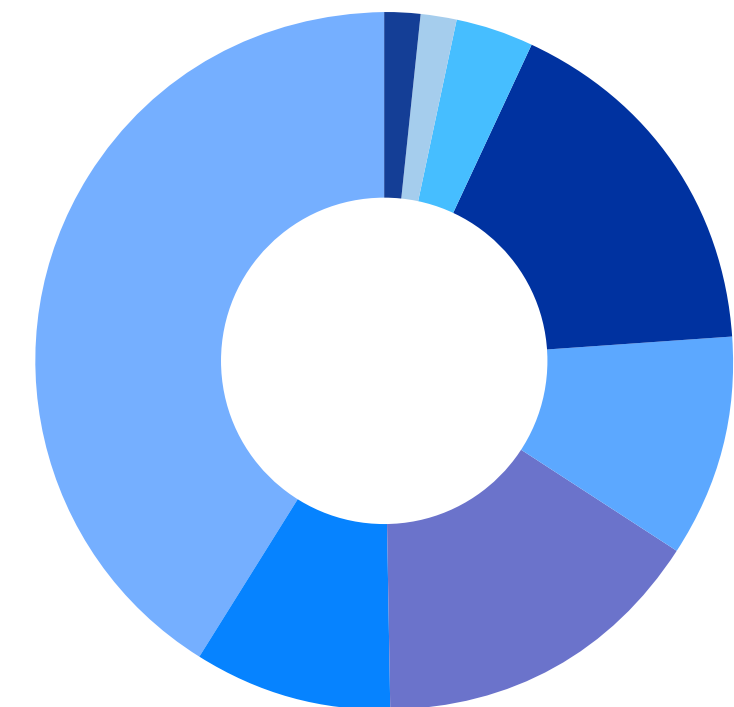


Attendee Profile

Spending Power

Almost one-quarter of attendees (24.1%) of ISE 2023 attendees told us they can authorise or recommend expenditure of over €1,000,000 per annum. (ISE 2023 exhibitors are excluded from these figures.)

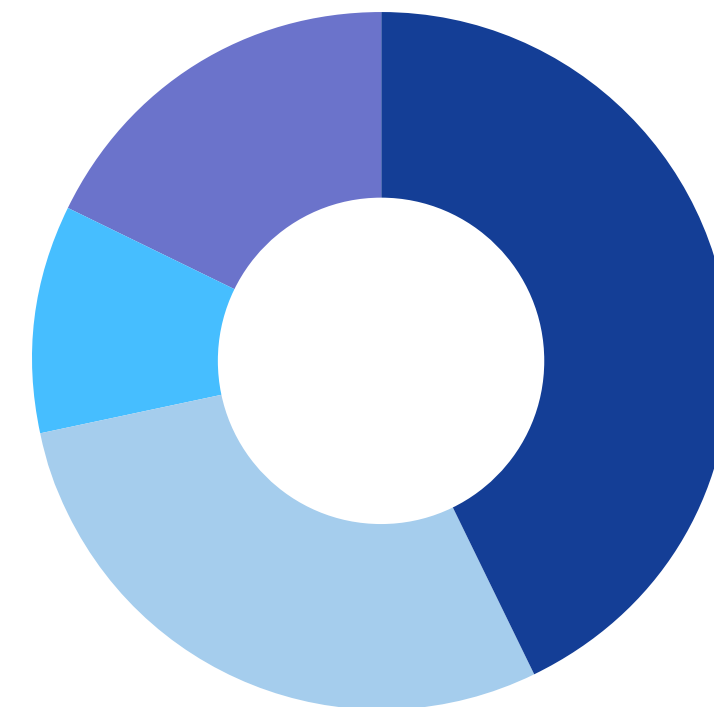
- **1.9%** €50m or more
- **1.5%** €25m - <€50m
- **3.7%** €10m - <€25m
- **17.0%** €1m - < €10m
- **10.2%** €500,000 - <€1m
- **15.8%** €100,000 - <€500,000
- **9.1%** Below €100,000
- **41.0%** Not sure / Don't know



Purchasing Authority

More than eight out of ten ISE 2023 attendees (82.4%) reported that they either made all the purchasing decision, influenced the decision or made recommendations for it. (ISE 2023 exhibitors are excluded from these figures.)

- **42.8%** Authorise Purchase (responsible for final decision)
- **29.1%** Recommend specific products or technologies
- **10.5%** Influence Purchase (but do not make specific recommendations)
- **17.6%** Not sure/Don't know



Attendee Profile

Where do our attendees come from?

The following table shows all ISE 2023 attendees (visitors and exhibitors, not including media) by country of origin. A total of **155 countries were represented** at ISE 2023, with the top 60 countries making up over **98.1%** of the total attendance.

The biggest increases in attendance came from countries in the Far East and Australasia that were affected by Covid-related travel restrictions in 2022: numbers for China, Chinese Taipei, Japan, Australia and Singapore all rebounded significantly.



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

AV Channel or End-User?

ISE 2023 classified all attendees by their primary area of business focus.*

AV Channel

Attendees who stated that they sell or recommend AV solutions to a customer are classified as belonging to the AV channel, which ISE divides into the following company types.

AV Channel	% All Attendees	% First Time Attendees
Integrator / Installer	22.35%	15.57%
Distributor / Reseller	16.67%	12.97%
Manufacturer	6.53%	5.93%
Consultant	4.18%	3.72%
Live Events Producer	2.92%	3.52%
Software Developer / Programmer	2.79%	3.17%
Design Firm	1.20%	1.50%
UC / CX Developer	0.16%	0.20%
Total AV Channel	56.18%	46.58%

End-Users

Attendees who stated that were looking for AV solutions for use within their own company are classified as AV users; together with those working for creative agencies and meeting and event planners, they make up the end-user category.

End-Users	% All Attendees	% First Time Attendees
AV User	35.64%	15.57%
Creative Agency / Artist	2.86%	4.01%
Meeting / Event Planner	0.55%	0.69%
Other	4.14%	5.32%
Total End-User	43.19%	53.42%

It's clear from these figures that the ISE demographic continues to evolve: the end-user percentage has risen significantly from 19.49% at ISE 2022 to **43.19% this year**.

Market Focus

55.4% Commercial

35.7% Commercial & Residential

8.9% Residential

Roles of Channel Visitors

Attendees from the AV channel were asked about their role within their organisation. Multiple answers were allowed.

Skill or Competency Role	Proportion of Channel Attendees
Sales / Business Development	35.47%
System Design	31.44%
Audio (Mixing, Engineering)	31.04%
Video (Projection Mapping, Production)	30.46%
Project Management	28.20%
Executive / Leadership	23.07%
Technology Management	21.19%
Lighting	20.73%
IP / Network Management	19.21%
Programming	18.85%
Cabling / Wiring	16.38%
Marketing	14.79%
User / Technical Support	14.52%
Administration/ Leadership	11.49%
Staging / Rigging	7.57%
Construction / Fabrication	7.49%
Architecture	7.31%
UX / CX Design	6.06%
Facilities Management	6.03%

*ISE 2023 exhibitors are excluded from these tables.

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. See [page 6](#) for the types of company included within these definitions.

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

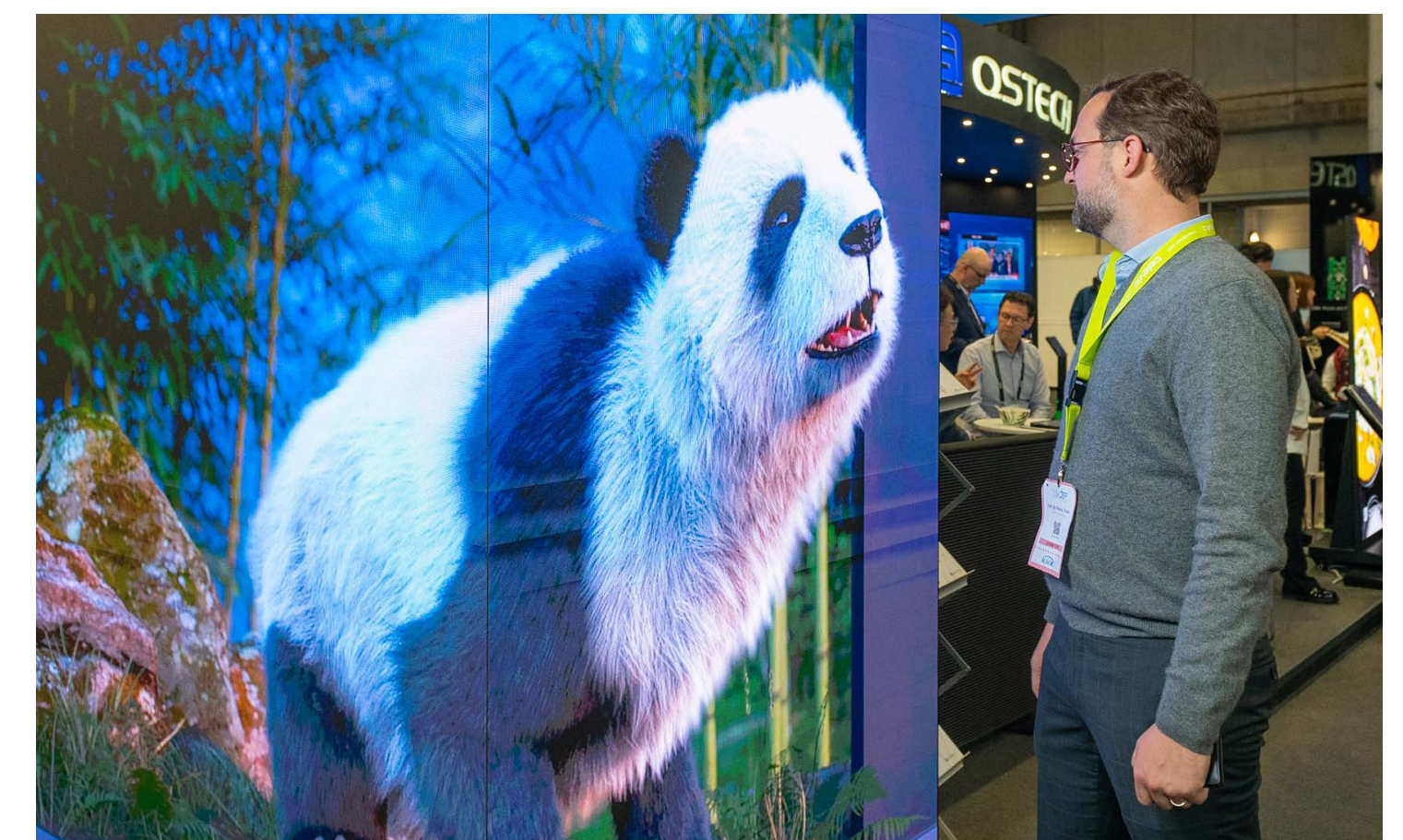
These are the market sectors for which channel attendees provide solutions or systems.

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



Professional Development

Expert Speakers

A total of **257 expert speakers** took part in ISE's programme of conferences, presentations and panel discussions.

ISE Conference Programme

Produced by AVIXA and CEDIA, eight conferences were held at ISE 2023, covering key vertical markets served by the AV industry:

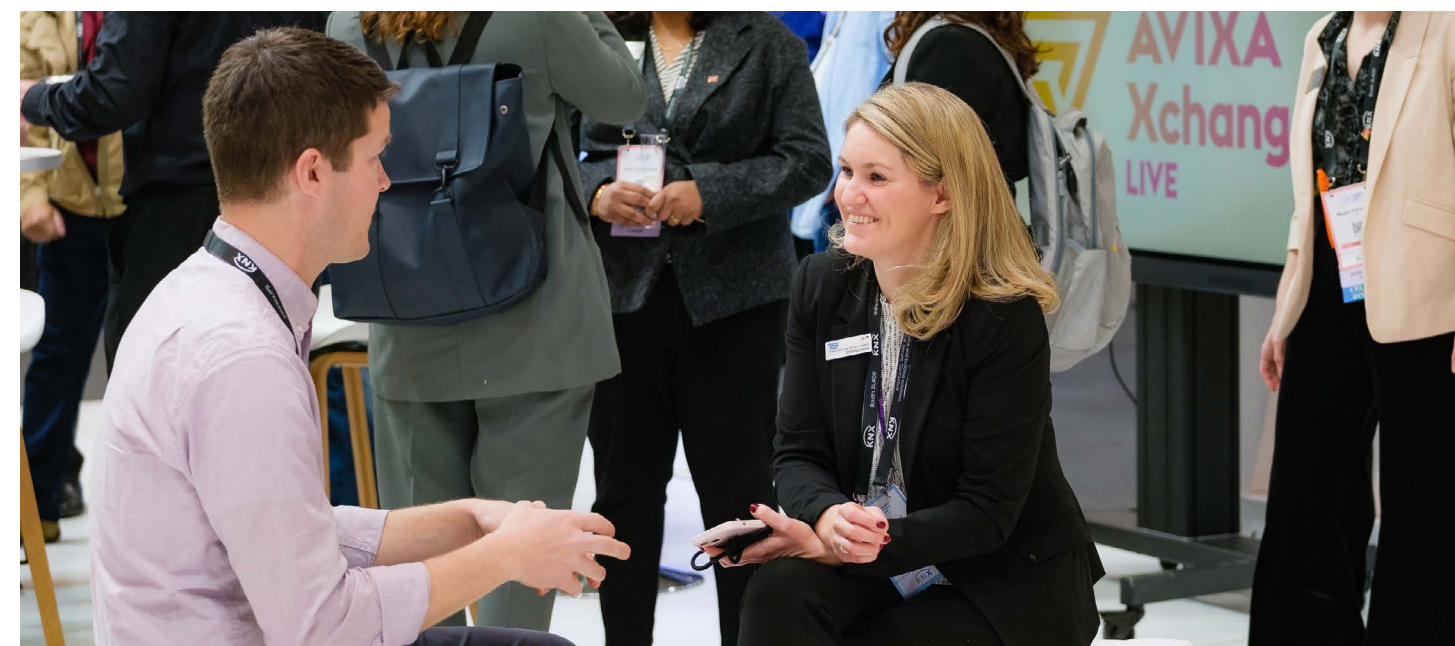
- > Content Production & Distribution Summit (New for ISE 2023)
- > Control Rooms Summit
- > Digital Signage Summit
- > Education Technology Summit
- > Live Events Summit
- > Smart Building Conference
- > Smart Home Technology Conference
- > Smart Workplace Summit

Keynotes

Three Keynote Addresses were held during ISE 2023. On the opening day, BK Johannessen, Business Director for Broadcast and Live Events at Epic Games, discussed the growing role of Epic's Unreal Engine in non-gaming applications in 'All Paths Lead to Real-Time'.

On the Wednesday, 'How Technology Enables the Stories of the America's Cup' was presented by Stephen Nuttall, Head of TV for the major sporting event, which comes to Barcelona in 2024.

The Keynote programme concluded on the third day with entrepreneur Fran Chuan, an expert in fostering the Culture of Innovation within organisations. His presentation 'How Innovative is the AV Industry?' drew on a survey of ISE exhibitors and attendees conducted in the run-up to the show.



AVIXA

AVIXA hosted a series of free-to-attend Tech Talks in English and Spanish to complement the conference programme.

The association also presented Xchange Live, a range of interactive sessions with thought leaders and industry experts; as well as hosting events organised by various AVIXA Councils.

CEDIA

CEDIA's Smart Home Technology Conference comprised more than 65 hours of professional development, covering areas such as technical installation and design, business excellence, and future trends.

In addition, free-to-attend events on the Smart Home Technology Stage addressed key issues facing the residential technology industry.



Media

Following the widespread lifting of Covid travel restrictions, ISE 2023 saw a **significant increase** in the numbers of media representatives visiting the show.

A total of **593** international media editors and journalists from **55** countries attended this year, (compared with 357 representatives from 20 countries at ISE 2022).

This increased breadth of representation meant that, despite a nearly 40% increase in the number of Spanish media, the country's share of total ISE media fell a few percentage points this year.



Country	Media Representatives	Proportion of Total
Spain	282	47.6%
United Kingdom	110	18.5%
Germany	40	6.7%
USA	40	6.7%
Italy	22	3.7%
France	20	3.4%
Poland	11	1.9%
Netherlands	9	1.5%
Romania	4	0.7%



IOT Solutions World Congress

IOT Solutions World Congress took place in Hall 4 at the Fira Gran Via on 31 January – 2 February 2023, the first three days of ISE.

A total of 4171 people who had registered for IOTSWC took the opportunity to also visit ISE.

Other than on this page, they are not included in any of the analysis in this brochure.

Visitors by Country

IOTSWC registrants who visited ISE 2023 came from 83 countries. Here are the top 20 most represented.

Country	Visitors	Proportion of Total
Spain	2764	66.27%
France	182	4.36%
United Kingdom	171	4.10%
Germany	161	3.86%
Italy	115	2.76%
United States of America	109	2.61%
Belgium	57	1.37%
Netherlands	53	1.27%
Poland	44	1.05%
Switzerland	38	0.91%
Portugal	37	0.89%
Finland	28	0.67%
Israel	25	0.60%
Sweden	24	0.58%
Denmark	19	0.46%
Norway	19	0.46%
Brazil	18	0.43%
India	16	0.38%
Austria	15	0.36%
Greece	15	0.36%

Job Titles

ISE drew attendees from across the IOTWSC audience, at all levels from CEO to student.

Job Title	Attendees	Proportion of Total
CEO	315	7.55%
Other C-suite	606	14.53%
Manager/Head/Supervisor	942	22.58%
Engineer	392	9.40%
Business Development	340	8.15%
Analyst/Developer/Programmer/Technician	284	6.81%
Cyber/ Data Security	176	4.22%
Consultant/Advisor	169	4.05%
Administrator/Assistant/Intern/Support	168	4.03%
Student	134	3.21%
Marketing/Communications	116	2.78%
Architect	97	2.33%
Scientist/Professor/Researcher	71	1.70%
Other/Not Known	361	8.65%

Company Types

Just under a third of ISE visitors from IOTSWC were from technology providers.

Company Type	Attendees	Proportion of Total
Technology Providers	1301	31.19%
Industry End-User Companies	859	20.59%
Research	340	8.15%
Government/Public Sector	272	6.52%
Cybersecurity Providers	215	5.15%
Cluster/Association	101	2.42%
Press/Media	69	1.65%
Not Known	1014	24.31%



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