

How will pro AV evolve over the next decade? Tim Kridel posed that question to vendors and integrators, whose predictions include a sales channel shakeup and opportunities in big data.



Pro AV's next decade

A decade ago this month, no one in pro AV – or anyone outside of Apple, for that matter – knew the iPad was coming. When it debuted four years later in 2010, AV vendors such as AMX and Stardraw were quick to develop apps because they recognised that the device would shake up the industry.

“I think the iPad will be a revolutionary step toward standard IT equipment being employed in pro AV applications,” Carsten Steinecker, Comm-Tec managing director told InAVate in April 2010. “The iPad makes us very enthusiastic that we can gain further ground against the legacy control companies, like AMX and Crestron.”

Joe Andrulis, AMX vice president of marketing, agreed about the revolutionary aspect: “I have no doubt that it will displace some of the market,” he told InAVate at the time. “It’s part of the nature of being in the high-tech business. If you’re not ready to accept that the world is going to shift under you and that you’re going to have to find new ways to add value, you’re in the wrong business.”

The iPad’s come-out-of-nowhere effect on

“I think the marriage between IoT and video is where the excitement should be.”

– Julian Phillips, Whitlock

pro AV is just one example of why it’s so tough to predict how the industry will change over the next year, let alone ten. But that’s not the same as dismissing pondering the future as an exercise in futility. Just the opposite: It forces vendors and integrators to identify where and how they can add value.

InAVate asked a handful of AV pros how they see the industry evolving. Here are highlights. For many of the full interviews, visit the InAVate website.

Demographic trends hint at new workstyles

Pro AV had to accommodate the iPad for the same reason enterprise IT departments did:

People brought them to work wanting to use them to control, collaborate, communicate and consume. Company policies and industry best practices often resisted for reasons such as security and interoperability, but they were beaten into submission by the sheer number of iPads.

Since then, similar scenarios have played out with devices such as Apple TV. But instead of trying to predict the next game-changing device, some AV pros are focusing instead on the bigger picture: the emerging ways that people want to work. Figure out what those preferences will be, and it becomes easier to accommodate the devices and services that enable those workstyles.

One way to identify emerging preferences is to look at demographics. For example, Michael >



< Frendo, Polycom executive vice president of engineering, points to the 94 million millennials who now are the largest demographic group in the workplace. They've grown up expecting to be constantly connected – not just to other people, but also to all of their content.

Frendo sees an opportunity for pro AV to enable seamless access to their work content, regardless of whether they're carrying an iPad, a wearable or no device at all. That means, for example, making sure that collaboration systems can tap into the cloud to get that content – and do so securely to accommodate their employers' requirements.

"It's not enough to provide a video feed or even content sharing," Frendo says. "You have to take into account that their personal workspace is far more than that."

Polycom is working to enable that with room systems where a person badges in and automatically has access to their workplace in the cloud, such as a presentation stored on OneDrive.

"It's just there. You don't have to bring anything into the room," Frendo says. "That gluing together, making that seamless, is going to be really disruptive. But I also think it's going to be expected. That's where millennials expect the world to go."

The AV-IT mashup continues, now with IoT

To enable those kinds of workstyles, AV will have to adopt more IT technologies and skills. This

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- Gorkem Celikbilek, Asimetrik

mashup isn't new, of course, and the safest bet about the next 10 years is that it will continue.

Part of this mashup is the Internet of Things (IoT), a catchall category spanning everything from surveillance sensors to drones. The InfoComm show in June will have an IoT pavilion.

"That's recognising the fact that IoT has a big role to play in the AV industry," says Julian Phillips, Whitlock executive vice president. "But I'm not sure everyone has figured out what it is. If you look at some of the headline-grabbing IoT applications, video is significant in a lot of them. I think the marriage between IoT and video is where the excitement should be."

Drone-based surveillance is one potential IoT video application where pro AV has a play, as the January-February 2015 InAVate explored. Other, less obvious possibilities lie in helping clients analyse and act on the deluge of data that IoT devices can provide.

For example, today an integrator might help a retailer develop a surveillance system that tracks how different demographics shop. Tomorrow, that integrator also might provide consulting to help the client use that information to revamp its stores. If that example sounds like a stretch, it highlights something that integrators will have

to grapple over the next decade: identifying which emerging opportunities have enough revenue potential to justify the cost and risk of pursuing them.

"Whitlock recently went through an exhaustive process of looking at our business model of the future," Phillips says. "We identified big data and analytics will be a significant part of our value proposition moving forward. That's not the kind of discussion you'd expect to have from an AV integrator."

Another IoT possibility is building management systems. Some AV firms are already in this space, such as to help their clients achieve LEED and other green certifications. IoT provides additional options and opportunities.

"We see a trend for interconnecting all building systems, [including] HVAC, building automation and management, pro AV, PA/VA, CCTV, network, etc.," says Gorkem Celikbilek, Asimetrik vice president. "Clients want easier controls for much more complex systems. As a consequence, we see that we are a part of the building engineering more, and have the chance to design the architecture of the system, and sit on the big table alongside building engineering firms."

Cordless Consultants sees similar opportunities.

“Suddenly AV has a whole new playground to expand into: the interface between a buildings’ previously siloed technology (such as room booking) and the human interface – the natural place for AV,” says Nigel Miller, managing director. “Smart buildings, able to report and respond, ultimately without intervention, to the human activities within the building are becoming reality.

“New ‘digital assets’ will become a tradable commodity, providing us with new services and convenience: for example, automatically offering to provide a taxi because the building knows you are late to depart for the airport. These digital assets will become increasingly sophisticated and will use a variety of interfaces, personal and building, and across the IT and AV functions to communicate with us.”

“AV systems will become a standard part of a converged network in smart buildings,” adds Graeme Harrison, Biamp Systems executive vice president.

Education is another market where IT, IoT and

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AV will come together.

“AV integrators will expand their range by supplying not only displays and interactive boards, but also equipment from related fields, such as digital lab and robotics,” says Elena Novikova, CEO of Polymedia JSC. “Definitely the share of mobile devices in the educational market will grow, thanks to the increasing popularity of use personal mobile devices in classroom activities. As a result, is possible to assume the growth of, and further development of classroom management software.”

In education and other verticals, the more systems there are in a space, the greater the opportunity for AV pros to knit them together in a way that makes them user-friendly.

“Our customers are far more technically aware than ever before,” says Rod Behr, Electrosonic

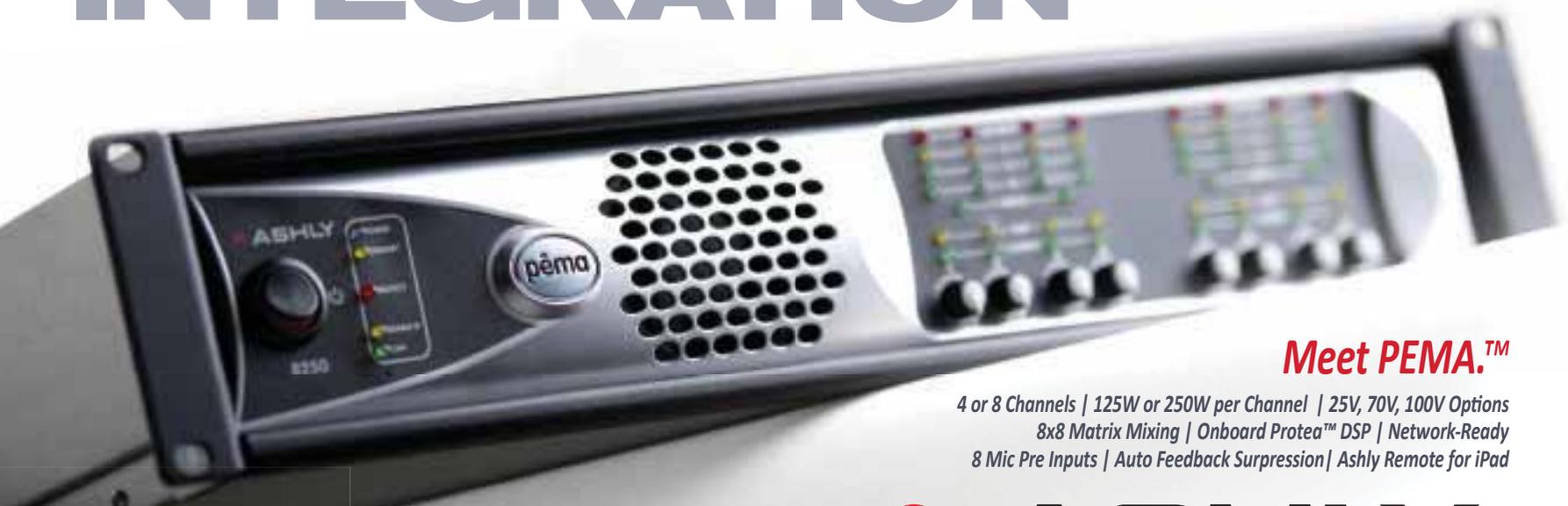
head of technology. “Whereas we used to be called upon to dial audioconferences on behalf of senior executives, technical fluency now means those executives expect to be able to operate systems themselves. Focus is therefore placed on control system GUI design and remote monitoring, rather than being able to have technical staff present with the technology.”

More competition from IT

The continued mashup of AV and IT creates another safe bet for the next decade: Even more IT firms will expand into pro AV.

“More or less all IT integrators will get their feet into AV,” says Harald Steindl, owner of Mocom, an Austrian audio specialist. “The >

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< current situation of most IT folks staying out of AV is due to the complexity of AV. Until quite recently, it was not easy to 'learn' AV. It was kind of a dark art.

“With more and more AV certification programmes, AV can and will be learned as 'easy'

as IT. The more software/programming/etc. will come into AV, and the more soldering and running wires goes away, there is not that much difference anyhow.”

The influx of IT firms will change the competitive landscape.

“[There will be a] sublimation of specialist AV knowledge to a consulting-only role,” says Chris Fitzsimmons, a Biamp Systems product manager. “The work of installing what we think of as 'AV products' today will be taken on by general IT contracting firms. The AV integration firm may choose to become an IT contractor or it could re-imagine itself as a consulting organisation.”

IT integrators will compete with AV firms not just for projects, but for talent, too. That means higher labour costs.

“IT companies do have a much stronger arm to attract young people,” Steindl says. “So even if the job is a traditional AV job, an IT company will be more successful attracting people than an AV company.”

Changing channels

Finally, some AV pros predict another potential marketplace change: vendors increasingly engaging in direct sales.

“The AV distributor as a local representative of multiple brands in various countries will go away quickly,” says Steindl, whose company just ended its relationship with Crestron. “Brands will have to have their own sales offices in each and every territory.

“Most likely they will leverage traditional mega-distributors like Ingram Micro and such for logistics and finance. This is exactly the same model as IT products are currently sold.”

Steindl also expects dealers to reduce the number of brands they represent and then develop closer relationships with the remaining ones.

“Gone will be the days of the AV integrator who changes suppliers as fast as their underwear,” he says. “Brands are simply not interested in having hundreds of 'me, too' dealers. The job is selling to the end user and generating market and not to convince the dealer to choose 'our' brand for his next project.

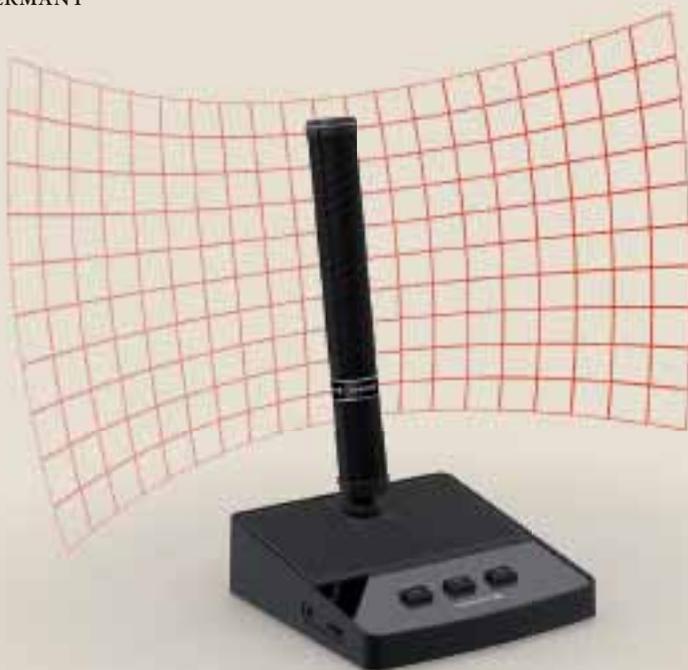
“Currently it seems that the majority of sales effort of AV brands go into this convincing of the dealer. What a waste! Just think about if BMW would concentrate most of their effort/time/budget in massaging the dealer instead of working the target end user.”

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