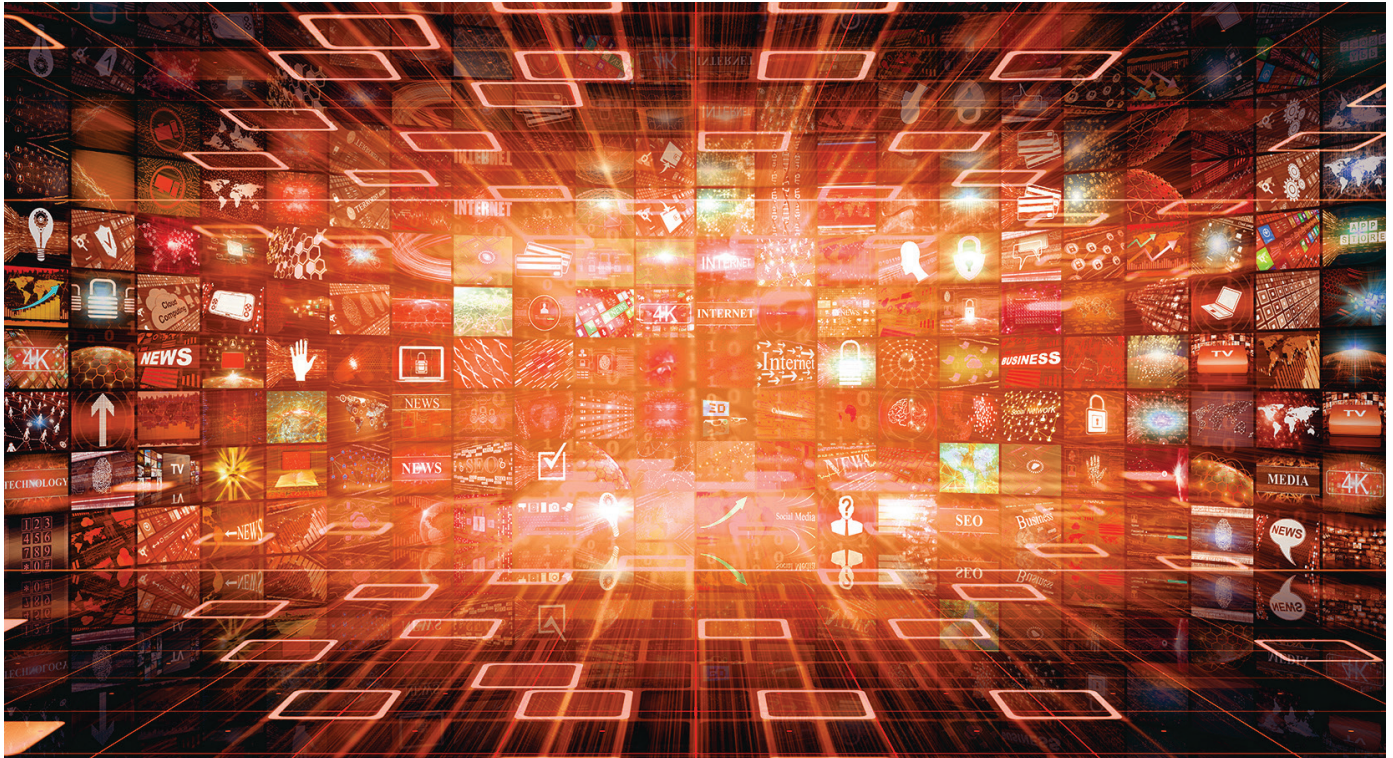


A large, colorful mosaic of various images and icons, arranged in a grid pattern. The images include people, technology, nature, and abstract designs, all in a vibrant, multi-colored palette. The mosaic is composed of many small, irregular tiles, each containing a different image or icon. The overall effect is a dense, complex visual representation of a wide range of subjects.

Audiovisual Provider Report

Audiovisual Provider Report



Audiovisual has always been IT's awkward step-sibling, with numerous tech resellers trying – and failing – to crack the adjacent world of videowalls, projectors and digital signage.

AV is still bossed by a pack of engineering-led specialists, including many of the 20 featured in this report, which recorded collective sales of close to £400m in their latest annual accounts, employing over 2,200 staff between them.

The fundamentals of AV – namely complex, non-repeatable projects and the need for numerous technical accreditations – have made it unattainable, or just plain unattractive, to IT specialists.

Although the two technology camps are converging, crossover between their respective channels remains limited, with many large IT VARs still choosing to outsource the AV component of a deal to a specialist rather than carry it out themselves.

Several sizeable reseller bankruptcies of late serve as a reminder that making a go of it in AV – particularly in the framework-driven universities market – is no easy task.

Yet AV remains a relatively healthy market, with collective revenues among the top 20 providers on our radar pogoing 5.3 per cent year on year. At 3.4 per cent, adjusted average operating profit margins among this top score of providers is fractionally lower than the average for the UK's Top 250 resellers, but rose on an annual comparison.

And with signs that true convergence between the AV and IT worlds could be finally around the corner, AV is a market that the mainstream channel should certainly have on its watchlist.

Meet the specialists

"AV is so much harder than the IT guys think. They've all tried it and had their fingers burned. In AV there is no global end-to-end vendor, so you can't just go to Cisco for an end-

to-end solution, create an SKU and sell thousands of them, which is what [IT resellers'] business is about. In AV, every single room requires localised design work."

That warning shot fired across the bows of IT resellers looking to branch out into AV comes from John Masters, a director at AVMI, the UK AV market's largest integrator.

AV is hostile and unforgiving territory for the uninitiated, so it is no surprise that the market is dominated by a pack of highly specialised, engineering-led integrators.

The top 20 AV resellers and integrators on our radar raked in combined revenues of £392m in their latest financial years on record, a 5.3 per cent annual jump, and had a total headcount of 2,233 – up by more than 100 year on year.

Despite each being sizeable players, Feltech, Pure AV, CDEC and Carillion AV could not be included in this analysis because they do not appear to disclose their revenues on Companies House.

The AV landscape encompasses everything from corporate videoconferencing to rock concerts, Masters explained.

"It's pretty diverse and also quite fragmented," he said. "You get the guys that are very good at events or theme parks, and then those that do more corporate work. AVMI is definitely in that corporate world, where it's basically meeting spaces, company event spaces and receptions – the only exception to that is we have ended up being involved in signage for retail."

While AVMI was built up through a string of acquisitions – most recently Impact in 2012 – the market's only other £50m-revenue player, ProAV, has grown organically.

"I think that's quite impressive, and they've done it because they are the kings of the building-tender world," Masters said. "Their customers are the builders, whereas we sell to the company. We do building tenders, but ProAV wins an unbelievably impressive majority of that work."

2.2x

AV integrators employ 2.2 times more staff than the wider Top 250 resellers per £1 of revenue

AVMI's strength is to target enterprises that are looking for a preferred partner."

Masters also drew a distinction between high-end AV players and those that specialise in videoconferencing and Microsoft Surface Hub, which lie halfway between the worlds of IT and AV. He picked out Saville, Electrosonic, ProAV and Reflex as examples of the former and Kinly, Digitavia and York Telecom as being in the latter camp.

"These AV racks are pretty scary. It's proper, heavy jelly technology. You can't say meeting rooms aren't AV, but they're not high-end AV," he explained.

Boom time

Be it videowalls, interactive screens, videoconferencing, or digital signage, we are all increasingly confronted by AV kit at work, in the classroom, and on the high street.

The AV market is booming, with global sales of videowalls, for instance, predicted to double to \$6.8bn between 2015 and 2018 by analyst Futuresource Consulting. The interactive whiteboard market, meanwhile, is set to be worth \$5.16bn by 2023, up from \$4.12bn in 2017, according to Markets and Markets.

In the corporate world, demand for "heavy jelly" AV is on the rise as chief executives demand their event spaces and auditoriums are kitted out with the latest and greatest technology, Masters at AVMI said.

"CEOs and senior management are now much more comfortable standing in front of 1,000 people and they want the toys to back them up," he said. "They want to bring in New York, move stuff around the screen, and make things look super cool. As a side point, the cost of big videowalls has come down: sticking something in your reception area that creates that impression of being cool and progressive might now cost you £200,000, rather than £500,000 only two years ago."

Firms are also increasingly rolling out standardised, global AV projects as more AV applications move onto the IT network and therefore come under the remit of the IT and telecoms teams, Masters added.

"It might be that they want to rip up the old way of doing things and have all these huddle rooms and open-plan scrum areas," he said.

'Huddle room' continues to be an active buzzphrase in AV, and is still open to interpretation, agreed Colin Etchells, group technical director at Saville AV.

"But there does seem to be a more casual approach to working, probably driven by millennials," he said. "It's leading to high-value projects but with not particularly complicated systems. They want to be able to collaborate with BYOD and Skype for Business, and the trend seems to be that the approach has to be scalable not only in the UK, but across Europe and global deployments."

The Alexa Echo and Google Home are now a common sight in our kitchens and living rooms, and Saville's head of marketing and product management, David Willie, picked out the rise of voice control in corporate meeting rooms as a major trend to watch out for.

"There are a lot of domestic voice control products that people are looking to put into that space, and that massively opens up potential security loopholes," he said.

Etchells added: "You've got people experimenting with artificial intelligence products like the Google

Home/Amazon Alexa products in a meeting room environment and tagging them to some corporate kit. It's the beginning of a trend that will develop and I think either you'll see corporate versions of those domestic products coming along, or a dumbing down of corporate products, to tackle that market."

Fine margins

The AV sector has seen several bankruptcies of late (*see p7*), and profit margins are generally slightly lower than the other specialist sectors *CRN*

Essential is examining in a series of mini-reports.

According to our analysis, the top 20 AV integrators banked combined operating profits of £13.2m on revenues of £392m in their last annual accounts, equating to a profit margin of 3.4 per cent.

Stripping out heavily loss-making AVEX, which is only just getting its UK business off the ground, average (mean) operating

profit margins among the 20 stood at 3.6 per cent.

That is significantly below the 5.8 per cent average profit margin recorded by the UK's top print specialists, and slightly below the 3.9 per cent average for the UK's Top 250 resellers generally.

Four of the top 20 recorded an operating loss in their last accounts, while only two players – GV Multimedia and Digitavia – posted double-digit profit margins.

Wage pressure doesn't appear to be at fault, with the typical AV integrator seeing their average (mean) salary rise only fractionally, from £39,290 to £39,561, in their last financial years on record, according to our analysis (*see p10*). That figure is slightly higher than the £34,433 average across the UK's top 20 print resellers, but significantly lower than the £60,709 figure across the UK's top 13 cybersecurity providers.

According to Etchells at Saville AV, over-reliance on universities business has sparked the collapse of at least two AV integrators, and has caused others to withdraw from the sector.

While Saville AV aims to work with a selected number of universities on the frameworks, these universities are ones driven by long-term strategies, design innovation and not by simply buying at the lowest price, he said.

"We are very selective about which university projects we work on," he said. "With our infrastructure and a total reliance on our own technical staff, we have to be conscious that we don't overstretch ourselves in this very competitive sector."

IT's awkward step-sibling

More AV products are moving onto the IT network, and the two technology areas are increasingly being procured by the IT department. Microsoft is also breaking down barriers between the two worlds with its Surface Hub.



"In AV there is no global end-to-end vendor, so you can't just go to Cisco for an end-to-end solution, create an SKU and sell thousands of them, which is what [IT resellers'] business is about. In AV, every single room requires localised design work"

John Masters, AVMI

Top 20 UK audiovisual providers



Total annual sales:
£392m



YoY growth:
5.3%



Average operating profit margin:
3.4%



Total headcount
2,231

And yet for most IT suppliers, the audiovisual market remains as impenetrable as string theory.

Large IT VARs have tried on numerous occasions to set up viable AV departments, but inevitably it becomes a very small part of their overall offering and very quickly not a sustainable option, said Saville AV's Etchells.

To understand why AV is such a tough nut to crack, it helps to examine the genetic make-up of AV integrators,

many of which are engineering-led businesses that hold a multitude of technical accreditations.

Fifth-ranked Electrosonic employs 263 staff but turns over a relatively modest £29m, while 200 of AVMI's 400 staff are engineers. The average audiovisual integrator employs a member of staff for every £188,000 of revenue it turns over, compared with a £412,000 average across the UK's top 250 resellers, our figures show. AV is a people-intensive business in a way the IT space isn't, also requiring local feet on the street.

"When you sell a telephone or a laptop, it just goes on a table – you can sell 1,000 of them and no one cares about the room," said Masters. "But in AV, you've got someone asking 'where do we put the screen? Where do we put this cable in this table? 'Where do the plugs go?' No furniture is standardised, so you need this design layer for every single space. IT hate that, because it means their scalability is way down. Also, when you're trying to do something global, you need local feet on the street. Their global models don't work for AV."

The growing hunger among employees to use Amazon Alexa-like technology in the workplace also calls for the kind of integration skills only specialist AV players possess,

Willie at Saville AV added.

"When the iPad came out everyone said it would revolutionise the AV world," Willie said. "All it's done is given the boys with touch panels a run for their money. It's a nice cheap screen, but the back end of it isn't awfully suitable

for a lot of uses without appropriate applications. The same thing is happening with Alexa and voice control."

"That's one of the reasons there's not more crossover

between IT and AV," added Etchells. "The IT channel is all about shifting boxes and doesn't know how to integrate these products. The client is saying 'I can do it with Alexa, why can't I do it with this, that and the other?' The AV integrator will have the knowledge to piece together those bits of kit because of their experience, which is clearly different from the IT model."

Traditionally, the distribution of video from multiple sources to multiple end-points such as displays, projectors and monitors has required a costly piece of hardware called a matrix switcher.

But analyst Futuresource Consulting recently declared AV over IP will revolutionise the low-latency pro-AV market.

So will the increasing proximity of the two technology camps eventually lead to more convergence between their respective channels?

"[IT and AV] technologies are being driven together and certainly in the next 10 years will be more aligned than ever before," said Etchells.

"It's not only AV equipment [going onto the network]. The next big step will be building control and lighting, and generally there will be convergence. The question will be, who is best placed to deal with that convergence?"

"[IT and AV] technologies are being driven together and certainly in the next 10 years will be more aligned than ever before. The question will be – who is best placed to deal with that convergence?"

Colin Etchells, Saville AV

\$6.8bn

Predicted size of global videowall market in 2018, double that of 2015 (*Futuresource Consulting*)

\$4.98bn

Size of global videoconferencing market in 2017 (*Research and Markets*)

\$4.12bn

Size of global interactive whiteboard market in 2017 (*Markets and Markets*)



1 AVMI**Revenue: £56.5m**

Operating profit: £1.2m

Operating margin: 2.2%

An 18 per cent surge in revenues in its year to 30 June 2017 has propelled AVMI ahead of ProAV to become the UK's largest specialist audiovisual integrator.

With over 400 staff, the Sunbury-on-Thames-based outfit – which is backed by private equity house Alcuin – has specified, designed, implemented and supported AV, videoconferencing and digital signage infrastructure for more than 800 corporate and public sector customers.

It flagged up an increase in demand from multinational corporate customers for standardisation of meeting rooms and other AV projects as a key trend in its annual accounts, adding that it won a “significant” contract during the year with a bank in North America. Its sales from outside Europe doubled to £2.9m. At £1.24m, operating profits for the year came in flat.

2 ProAV**Revenue: £53.3m**

Operating profit: £2m

Operating margin: 3.8%

The second-largest audiovisual specialist in this report recently launched a Frankfurt operation to facilitate improved European delivery and mitigate any risk associated with Brexit. In its recently filed accounts for the year to 31 March 2017, the UK still generated 91 per cent of total revenues, which dipped by 10 per cent to £53.3m.

The Egham-based outfit, which is owned by two of its directors and has a 25-year relationship with Barclays Bank, saw average staff numbers swell past 300 during the year. It drew £40.5m of its revenues from audiovisual sales, and the remaining £12.7m from facilities management. ProAV's operating profit grew from £1.6m to £2m, although its holding company posted a £615,000 loss.

3 Kinly (formerly Viju)**Revenue: £37.2m**

Operating loss: £209,000

Operating margin: -0.6%

Private equity house Avedon Capital Partners claimed last September that it had created a leading global provider of audiovisual, videoconferencing and collaboration with its double acquisition

of Viju and VisionsConnected. A new brand identity for the duo, Kinly, was unveiled at ISE on 6 February 2018.

Microsoft Surface Hub partner Viju's UK accounts for the year to 31 December 2016 show total revenue climbing 10 per cent to £37.2m, with £14.5m of that total coming from the UK and £22.7m from elsewhere. It sank to a £209,000 operating loss for the period as it complained of lower hardware margins.

Globally, the enlarged firm has its HQ in Amsterdam, with offices across EMEA, the USA and Asia-Pac.

4 The Saville Group**Revenue: £34.4m**

Operating profit: £1.9m

Operating margin: 5.6%

This York-based audiovisual specialist's chairman, John Sills, hung up his boots after 48 years in April, as part of a management buyout. Despite a one per cent drop in revenues, operating profits for its year ending 31 December 2016 doubled to £1.9m thanks to “a conscious effort to control costs and improve supplier relations”. The group's parent, £42m-turnover outfit SEA Holdings, also owns AV furniture maker Quadra Concepts.

Founded originally as a pharmacy in York in 1876, the firm now employs over 250 staff in 10 locations.

5 Electrosonic**Revenue: £29.6m**

Operating profit: £689,000

Operating margin: 2.3%

Plying its trade since 1964, this Dartford-based audiovisual specialist now has 260 staff, serving customers in the UK, Europe, the Middle East, Africa and Asia. Installing a videowall in the Hindhead tunnels on the A3 in Surrey is among the case studies listed on its website. Its revenues bulked up 15 per cent in its year to 31 December 2016, with operating profit hitting £688,000, compared with a £369,000 loss a year earlier.

6 GV Multimedia**Revenue: £28m**

Operating profit: £3.7m

Operating margin: 13%

This Hounslow-based audiovisual integrator enjoyed a barnstorming year to 31 March 2017, as revenues pole-vaulted 16 per cent to £28m and

operating profits clambered from £3.2m to £3.7m.

Last year, it was selected by Microsoft as an authorised device reseller for the Surface Hub. Its website includes case studies in the education sector, including Cardiff Business School, the University of Exeter, the College of Merthyr Tydfil and Falmouth University. It recently opened its fifth office in Newcastle.

7 IDNS**Revenue: £21.7m**

Operating profit: £374,000

Operating margin: 1.7%

This Bolton-based audiovisual and IT supplier recently designed and specified all AV system requirements for the University of Cambridge's new David Attenborough Building. Revenues and operating profits for its year to 31 July 2016 were both roughly flat, at £21.7m and £374,000 respectively. It counts NEC and HP among its key partners.

8 AVI-SPL**Revenue: £19.5m**

Operating loss: £124,000

Operating margin: -0.6%

Having only launched a business here in 2013, Florida-based AVI-SPL is already the UK's eighth-largest dedicated AV player by our estimates, and now has offices in Farnborough and Aberdeen. Its UK arm hit revenues of £19.5m in its year to 31 December 2016, a nine per cent annual hike. It blamed a small loss on internal restructuring, workforce investment, and foreign exchange losses incurred on inter-company borrowings. The Cisco, Microsoft, Polycom, Creston, Samsung and NEC partner claims to be the world's largest AV integrator.

9 Smartcomm**Revenue: £15.1m**

Operating profit: £207,000

Operating margin: 1.4%

This High Wycombe-based AV integrator has a residential arm that designs and installs AV kit for “super prime residential projects”, super yachts and hotels. The case studies on its website include a £280,000 project to kit out seven floors of Saatchi & Saatchi's London HQ with AV solutions. For its year to 31 December 2016, revenues dipped by two per cent, while its margins were “adversely impacted” by projects that had been sold and priced pre-Brexit referendum, but delivered after it.

Inside London Metropolitan University's 'superlab'

London Metropolitan University's 'superlab' will be an alien vision for anyone who left the education system more than a decade ago.

Following the £600,000 rollout of a new AV streaming solution, the university's Science Centre now boasts the largest 'Wyrestorm' system in the world, enabling 268 students to work there at one time while engaging with any one of up to 12 different lectures running simultaneously.

The project was delivered by Reading-based Reflex, ranked 13th in this report, and must be one of the more Byzantine installations completed by an AV integrator in the last year.

Students receive the audio for their chosen lecture via their own headphones connected to portable receivers worn in their lab coat pockets and pre-set to the correct lecture channels. The associated video material is shown on a display mounted above the assorted scientific equipment on their desks; these same displays double as their local PC monitors.

Each lecturer station has the same set up as above but with the addition of a tabletop visualizer and a PTZ camera, mounted above the display. The lecturer has a simple membrane

keypad on the desktop to select what is broadcast to the students at any point in the lecture.

"A major element of the project was the removal of old equipment including 280 heavy glass-fronted monitors, a process that took several weeks," said Reflex project manager Sam Barter. "The re-use of existing cable infrastructure also made it necessary to carry out extensive testing of all network ports before working bench by bench to install new equipment. All high-level work had to be carried out when the lab was free of staff and students, on just one day each week. Even so, we managed to keep ahead of the original schedule right through to completion."



10 York Telecom

Revenue: £13.3m

Operating loss: £253,000

Operating margin: -1.9%

Despite referencing "uncertainty" in the UK economy, the UK arm of this US-based videoconferencing reseller grew revenues seven per cent in its year to 31 December 2016, with gross margin and profits also improving. The Basingstoke-based Cisco, Polycom and Vidyo partner saw operating losses widen from £19,000 to £253,000, however.

11 Involve Visial Collaboration

Revenue: £13.2m

Operating profit: £747,000

Operating margin: 5.7%

Founded in the 1940s as a TV and radio rentals chain, this Warrington-based AV integrator today employs 124 staff. Revenues hit £13.2m in its year to 31

December 2016, a 12 per cent pro-rata hike on the £18m generated in its previous 18-month reporting period. Involve says it achieves global reach through its membership of the PSNI, a worldwide alliance of audiovisual integrators. Its technology specialisms include huddle rooms, collaboration and Skype for Business.

12 Universal Group Holdings

Revenue: £12.9m

Operating profit: £938,000

Operating margin: 7.3%

The retirement of Universal AV Services founder Carl Harris in 2016 sparked a management buyout and formation of a new holding company, Universal Group Holdings. Now a wholly owned subsidiary of this new group, Universal AV Services said in its annual accounts that it is gearing up for expansion at its Bradford HQ after securing preferred AV supplier status for universities in the North East and North West.

Revenues and operating profits for the year to 31 December 2016 at the new holding company were both slightly up on those Universal AV Services achieved a year earlier.

13 Reflex Limited

Revenue: £12.8m

Operating profit: £298,000

Operating margin: 2.3%

This 'full-service' audiovisual integrator said it was disappointed that revenue and operating profits were both down – by nine and 50 per cent respectively – in its year to 31 December 2016. But the Reading-based firm has "ambitious" growth plans for the next five years following the recent retirement of managing director Roland Dreesden.

In January, Reflex bagged a £600,000 contract to deploy a new audiovisual streaming solution for London Metropolitan University's Science Centre (*see case study, above for more details*).

14 Roche Audio Visual**Revenue: £12m**

Operating profit: £576,000
Operating margin: 4.8%

This AV integrator was pleased that its margins held up in a “challenging market” in its year to 31 December 2016. Revenues rose 15 per cent, while operating profits fell slightly, from £655,000 to £576,000. Founded in 1973, the West Yorkshire-based firm partners with the likes of Clevertouch, Canon, Epson, Smart and Hitachi. Roche recently worked in partnership with Panasonic to kit out the University of Huddersfield with 122 AW-HE2 cameras in a project designed to allow students to record and annotate conferences.

15 Focus 21 Visual Communications**Revenue: £10.5m**

Operating profit: £226,000
Operating margin: 2.1%

Founded in 1998, Focus 21 bills itself as an engineering company specialising in the integration and services of audiovisual and videoconferencing

systems. The Surrey-based firm, which has more than 80 staff, said it “performed in line with expectations” in its annual accounts for the year to 30 April 2017. During the period, revenues were down four per cent but operating profits nearly trebled. A deal to kit out investment firm Carlyle Group’s new UK headquarters with audiovisual technology is among the case studies listed on Focus 21’s website.

16 Snelling Business Systems**Revenue: £8.3m**

Operating profit: £192,000
Operating margin: 2.3%

This Norwich-based AV design and installation specialist is run as a charitable trust set up by its founder Roy Snelling. Its website boasts an impressive array of corporate, education and public sector case studies, and the business struck an optimistic note in its annual accounts for the year to 30 April 2017 following its launch into the local schools market.

Annual revenues rose by 16 per cent, with operating profits nearly doubling. It recently became a member of the PSNI alliance of AV integrators.

17 Digitavia**Revenue: £7.6m**

Pre-tax profit: £844,000
Pre-tax profit margin: 11.1%

Based in Egham, Digitavia specialises in supplying and installing audiovisual kit for business events and conferences. It is one of the more profitable audiovisual resellers, with pre-tax profits (it didn’t disclose our preferred measure of operating profit) in its year to 31 August 2016 of £844,000 equating to an 11.1 per cent margin. Revenues rose four per cent. Vendor partners include SMART, Polycom, Lifesize and MultiTaction.

18 Scotia UK**Revenue: £3.2m**

Operating profit: £57,000
Operating margin: 1.8%

This Edinburgh-based AV supplier and installer boosted revenues by two per cent in its year to 30 April 2017, with nearly £1m of its £3.2m haul drawn from outside the UK. Counting 3M, Sony, Sanyo, NEC, Smart and Polycom among its vendor partners, Scotia specialises in projector systems, audio technology, video and audioconferencing, digital

When AV doesn’t pay

The recent collapse of Microsoft Surface Hub partner Millennium Business Systems underlines the fine margins between success and failure in the AV sector.

Millennium fell into administration in November following a winding-up petition from a supplier. The Wokingham-based firm, which had recently won a place on a £800m Welsh public sector IT framework, had been trading since 1999.

But it is not the only high-profile bankruptcy suffered by the AV channel in recent years.

Leatherhead-based Pixel Projects went bust in October 2016 after it ran into financial difficulties. The £3m-revenue integrator was sold by the administrator to current management and operates today under the Pixel Global banner.

Going further back in time, Nottingham-based Quadrant Visual Systems was liquidated in 2013. It turned over £7m.

Millennium Business Systems went bust owing 197 unsecured creditors about £2.1m.

According to a recent administrator’s report, Millennium was unable to complete a planned refinancing after a supplier – who was chasing a payment of £238,000 – issued a winding-up petition against the firm. Millennium found itself under cashflow pressure after planned growth from an investment in staff failed to materialise.



Clubbing together

If the UK audiovisual channel is notoriously fragmented, the global landscape is even more so, with very few international players of scale.

This may partly explain why global alliances designed to allow local integrators to buddy up on international projects are thriving.

The Global Presence Alliance, which is a consortium of AV and collaboration integrators with presence in more than 50 countries, recently celebrated its tenth anniversary. It counts Feltech as its UK member and also includes Benelux outfit AVEX – whose UK arm ranked 20th in this report – in its ranks.

The rival Professional Systems Network International (PSNI), meanwhile, bills itself as the “ultimate industry credential” for organisations seeking AV solutions. It counts 11th-ranked Involve, 16th-ranked Snelling and Candeo Vision as its UK members. The recent addition of Switzerland-based AV integrator Lemanvisio to its ranks brought the number of licensed offices to 115.

In its recent annual accounts, Snelling said its recent appointment to the PSNI would enable it to “access the benefits of standardisation in all environments, a single point of contact for global projects, economy and quality”.



signage, interactive technology and control systems.

19 Videocentric

Revenue: £2.4m

Operating profit: £7,000

Operating margin: 0.3%

This videoconferencing specialist recorded a tiny £7,000 operating profit on revenues that swelled 21 per cent

to £2.4m in its year to 30 September 2014. In November, the Reading-based firm launched a device-as-a-service programme around vendor partner Lifesize’s technology.

20 AVEX International

Revenue: £582,000

Operating loss: £234,000

Operating margin: -40.2%

A relative newcomer to the region, having only incorporated a UK business in 2013, this Netherlands-headquartered Microsoft Surface Hub partner almost trebled UK revenues to £582,000 in its year to 31 December 2016. Operating losses, however, hit £234,000 as administrative costs rose to £549,000. AVEX International is part of the Global Presence Alliance, an international network of audio, video and comms companies.



	Revenue	YoY growth	Operating profit	Margin
AVM Impact	£56.5m	18.4%	£1.2m	2.20%
ProAV	£53.3m	-10.4%	£2m	3.79%
Kinly (formerly Viju)	£37.2m	9.9%	£209,000	-0.56%
The Saville Group	£34.4m	-1.4%	£1.9m	5.60%
Electrosonic	£29.6m	14.7%	£688,000	2.33%
GV Multimedia	£28m	16.2%	£3.7m	13.12%
IDNS	£21.7m	0.3%	£374,000	1.72%
AVI-SPL	£19.5m	9.4%	£124,000	-0.63%
Smartcomm	£15.1m	-2.0%	£207,000	1.37%
York Telecom	£13.3m	7.3%	£253,000	-1.91%
Involve Visual Collaboration	£13.2m	10.2%	£747,000	5.65%
Universal Group	£12.9m	5.7%	£938,000	7.26%
Reflex Limited	£12.8m	-8.8%	£298,000	2.32%
Roche Audio Visual	£12m	14.7%	£576,000	4.81%
Focus 21 Visual Communications	£10.5m	-3.6%	£226,000	2.14%
Snelling Business Systems	£8.3m	16.4%	£192,000	2.31%
Digitavia	£7.6m	3.9%	£844,000	11.14%
Scotia UK	£3.2m	2.4%	£57,000	1.78%
Videocentric	£2.4m	21.4%	£7,000	0.29%
AVEX International	£582,000	182.5%	£234,000	-40.21%
Total	£392.1m		£13.2m	3.41%
YoY growth	5.28%		3.7%	

Top 20 specialist audiovisual providers: Headcount and wages



	Headcount	Previous year		Average wage	Previous year
AVM Impact	410	400		£40,017	£38,448
ProAV	304	295		£42,296	£43,169
Kinly (formerly Viju)	144	134		£45,431	£44,679
The Saville Group	235	239		£32,511	£31,230
Electrosonic	263	256		£37,418	£36,410
GV Multimedia	81	75		£45,395	£43,267
IDNS	73	68		£44,137	£44,059
AVI-SPL	121	91		£49,760	£49,033
Smartcomm	72	60		£45,250	£47,217
York Telecom	67	64		£47,179	£46,328
Involve Visual Collaboration	124	107		£29,218	£30,710
Universal Group	89	90		£26,135	£25,367
Reflex Limited	52	50		£40,885	£41,460
Roche Audio Visual	43	39		£31,116	£25,974
Focus 21 Visual Communications	82	89		£36,476	£33,225
Snelling Business Systems	46	47		N/A	N/A
Digitavia	N/A	N/A		N/A	N/A
Scotia UK	22	26		£37,318	£35,346
Videocentric	N/A	N/A		N/A	N/A
AVEX International	5	2		£42,000	£52,000
Total	2,233	2,132	AVERAGE	£39,561	£39,290

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