

2025 TECHNOLOGY INNOVATION LEADER

Enhancing Customer Impact Through Powerful Technology Integration

RECOGNIZED FOR BEST PRACTICES IN THE GLOBAL AUDIO VIDEO COMMUNICATIONS INDUSTRY

FROST & SULLIVAN

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Best Practices Criteria for World-class Performance

Frost & Sullivan applies a rigorous analytical process to evaluate multiple nominees for each recognition category before determining the final recognition recipient. The process involves a detailed evaluation of best practices criteria across two dimensions for each nominated company. QSC excels in many of the criteria in the audio video (AV) communications space.

RECOGNITION CRITERIA	
Business Impact	*Technology Leverage*
Financial Performance	Commitment to Innovation
Customer Acquisition	Commitment to Creativity
Operational Efficiency	Stage Gate Efficiency
Growth Potential	Commercialization
Human Capital	Application Diversity

The Strategic Imperative 8: Factors Creating Pressure on Growth



- **Innovative Business Models**: A new revenue model that defines how a company creates and capitalizes economic value, typically impacting its value proposition, product offering, operational strategies, and brand positioning
- **Customer Value Chain Compression**: Customer value chain compression as a result of advanced technologies, internet platforms, and other direct-to-consumer models that enables the reduction of friction and the number of steps in customer journeys
- **Transformative Megatrends**: Global forces that define the future world with their far-reaching impact on business, societies, economies, cultures, and personal lives
- **Disruptive Technologies:** New, disruptive technologies that are displacing the old, and significantly altering the way consumers, industries, or businesses operate
- **Internal Challenges**: The internal organizational behaviors that prevent a company from making required changes

- **Competitive Intensity**: A new wave of competition from start-ups and digital business models that challenge the standing conventions of the past, compelling established industries to re-think their competitive stance
- **Geopolitical Chaos**: Chaos and disorder arising from political discord, natural calamities, pandemics, and social unrest that impact global trade, collaboration, and business security
- **Industry Convergence**: Collaboration between previously disparate industries to deliver on whitespace cross-industry growth opportunities

Reimagining the Workplace

Modern work has reshaped employee and leadership expectations, inspiring businesses to rethink the workplace from the ground up. The rise in hybrid work and an explosion in AI capabilities have been the key drivers of this transformation, prompting organizations worldwide to realign their workplace and technology investments.

> *"Today's challenging economic landscape demands a precise focus on achieving business outcomes through a performance and productivity-driven growth strategy. Success in this market hinges on having a forward-looking vision of end-user needs and leading with the integration of cutting-edge technologies. At the forefront of this transformation is the Q-SYS platform from QSC, a full-stack AV platform that provides turnkey solutions to build engaging and productive workplaces."*
>
> ***- Roopam Jain***
> ***VP of Research, Connected Work***

Today's challenging economic landscape demands a precise focus on achieving business outcomes through a performance and productivity-driven growth strategy. Businesses recognize that a comprehensive workplace transformation that enhances employee productivity and engagement, thereby improving business performance, offers a competitive edge.

Frost & Sullivan identifies this fast-emerging trend as the "high-performance workplace," a vision that spans the entirety of the work environment, from the lobby to the boardroom and all spaces in between. The concept of a high-performance workplace extends beyond traditional offices to include hospitality, healthcare, learning environments, retail stores, stadiums/event venues, and more.

Central to the success of the high-performance workplace is the seamless integration of AI, IT, and AV technologies, which create the ideal conditions to transform traditional spaces into vibrant, efficient, and intelligent environments. These workplaces span the entire built environment, offering a holistic and purposeful experience that enhances efficiencies while motivating employees to excel. Achieving this transformation requires a comprehensive approach that includes AV devices and control systems, advanced lighting, building management, HVAC, sensors, wayfinding, and space booking and utilization.

A key element of the workplace transformation is investing in a state-of-the-art, full-stack AV platform that harnesses the power of AI and data across all aspects of the physical workplace, creating smarter, safer, and greener spaces. The global AV solutions market is quite complex and competitive, with numerous providers striving to differentiate their solutions, especially as features

and functionalities overlap across platforms. Frost & Sullivan notes that success in this market clearly hinges on having a forward-looking vision of end-user needs and leading with the integration of cutting-edge technologies. In this environment, providers must demonstrate the breadth and depth of their portfolio, rapid technological development, and the expertise required to support shifting customer needs. Providers that exhibit these qualities are thriving and have ascended to leadership positions.

At the forefront of this transformation is the Q-SYS platform from QSC. The full-stack AV platform provides turnkey solutions to build engaging, efficient, and productive workplaces. Frost & Sullivan recognizes how Q-SYS has emerged as an industry-leading platform by addressing the critical need to consolidate devices and data within a cloud-first architecture, integrate advanced audio, computer vision-enhanced video, and AI control solutions, prepare for future machine learning applications, and drive a singular operating system to deliver real-time actions and insights.

Leading Through Innovation: The Power of the Full Stack AV Platform

Since its inception in 2009, Q-SYS has been dedicated to developing a paradigm-shifting platform technology approach that empowers AV systems to deliver real-time action, data-driven insight, and greater flexibility to meet the demands of customers and modern spaces.

A full stack AV platform is a forward-looking technology approach based on well-established IT architecture principles, including multimodal I/O, a cognitive cloud, and an intelligent platform OS. This approach contrasts with the AV industry's trend of creating bespoke, hardware-centric, and complex solutions. By integrating audio, video, and control processing at the software layer, Q-SYS solutions offer the flexibility to be reconfigured based on end-user needs, reducing the necessity for “rip-and-replace” exercises and resulting in maximum return on investment for customers.

As an example of their commitment to full stack AV platform innovation, In 2023, QSC acquired Seervision, a company specializing in AI-based camera tracking and positioning solutions. The integration into the Q-SYS platform resulted in a solution called Q-SYS VisionSuite, a new way to think about full-room automation control for in-room and remote collaboration. Instead of merely focusing on camera controls, Q-SYS utilizes VisionSuite’s available multimodal inputs, including computer vision and audio data, to automatically manage all aspects of the room — including cameras, lighting, shades, displays, loudspeakers, and microphones. This provides a fully automated, intelligent collaboration experience, allowing presenters and participants to focus on their interactions without ever considering the room’s controls.

Certified for Microsoft Teams and Google Meet, VisionSuite enables intelligent spaces where in-room participants collaborate without constraints—elevating remote participation by closely following the action and allowing programmers to deploy camera and room automation with unprecedented simplicity.

- Room Intelligence and Automation: The Q-SYS Control engine creates dynamic and responsive spaces tailored to the presenter’s natural movement and presenting style, allowing for a range of position/location-triggered automation.

- Presenter Spotlight: The system creates automatic, fluid camera tracking for the presenter, ensuring that they remain visible and properly framed throughout the meeting.
- Speaker Spotlight: VisionSuite delivers responsive camera switching and dynamic "on-the-spot" live camera positioning based on in-room speakers' voices and location (without the need for individual, predetermined camera presets), creating a more dynamic and engaging experience for remote participants.
- Innovative Design Tools: A unified visual interface for design and commissioning ensures a more successful deployment.

These advanced features collectively create a more engaging, efficient, and inclusive hybrid meeting, addressing the challenges of keeping everyone connected and productive. Specifically, in high-impact spaces with a presenter, live audience, and remote participants, it empowers the far end to receive the full context of what's going on in the room for audience reactions (particularly non-verbal ones) while still focusing on what the presenter is doing.

Pivoting for Growth with a Value-Driven Approach

QSC was acquired by Acuity Inc. in January 2025, significantly expanding the addressable markets it serves. Acuity is a market-leading industrial technology company with two business segments, Acuity Brands Lighting and Acuity Intelligent Spaces, that design, manufacture, and bring to market products and services that improve the workplace experience. Acuity's acquisition of QSC addresses new opportunities from integrating audio, video, and content platforms with smart building technologies (e.g., sensors, advanced lighting, HVAC, wayfinding, space booking, and analytics) to unlock the true potential of high-performance workplaces.

Since the acquisition, the company has expanded its reach, positioning itself for greater success. This integration creates unique opportunities to develop contextually aware and responsive spaces that recognize user needs, understand their objectives, and dynamically adapt to their communication requirements. Real-time data can trigger automated actions based on environmental factors such as CO_2 levels, temperature, and lighting. By transforming real-time user behavior into actionable insights and leveraging AI to enhance the workplace experience, the platform improves work quality and fosters collaboration, productivity, and differentiation. This comprehensive approach consolidates granular insights from both user experiences and physical spaces, ensuring that every square foot of the workplace is utilized effectively. The result is a market-leading, differentiated strategy that enables customers to integrate building management systems with AV platforms, unlocking valuable data for IT, facilities, and HR to drive better business outcomes, including more effective team collaboration, energy savings, and support for sustainability.

A Strong Partner Ecosystem

Q-SYS delivers an end-to-end portfolio of technology solutions by continually growing its ecosystem of partners. It works with a variety of partners for ceiling microphones, displays, in-room compute,

meeting controllers, and other third-party device manufacturers to complement the native Q-SYS product portfolio.

The Q-SYS ecosystem, includes over 100 certified technology solutions and the Developer Partner Program—that enables growth and accelerates development and innovation on the Q-SYS platform. In addition, their online developer community, Q-SYS Communities for Developers, now includes approximately 9,500 active users.

The Q-SYS alliance partner engagement includes certified/endorsed integrations with the top four unified communication vendors (Cisco, Google, Microsoft, and Zoom), and additional partnerships with Dell, Lenovo, and Intel. The company also enables a broad ecosystem of third-party integrations and open API-driven solutions, allowing customers to create customized experiences.

Simplicity at Scale

Complex automation typically requires complex programming with AV industry-specific tools. Q-SYS empowers IT administrators with no-code and low-code design solutions and accessible programming tools built from standard IT languages and technologies. The company champions the idea that delivering robust AV experiences should not be hindered by complex systems that are difficult to manage and scale.

Q-SYS advocates that AV technologies should be built on a simple, manageable, and flexible platform. The company includes Q-SYS Reflect, its remote management and monitoring solution, as part of every Q-SYS system, allowing IT admins to maximize their resources, efficiently triage and resolve issues, and proactively anticipate potential problems before they arise. Q-SYS Reflect offers real-time visibility, reliability data and control of all AV devices, including native and third-party devices, providing a comprehensive view of a customer's estate. This helps organizations ensure maximum uptime for their AV infrastructure while making timely decisions based on detailed, real-time system information. The free Q-SYS Reflect API extends comprehensive AV system data to a customer's existing IT/building management platform with no limits on use. Those systems that require more robust system management capabilities can opt to invest in Q-SYS Reflect Plus licenses that offer even greater enhanced remote management and control features.

Rapid Customer Acquisition with Superior Growth Potential

Frost & Sullivan's research has shown that the market for the high-performance workplace segment is booming, driven by significant changes in today's workstyles and technology trends. According to a global survey of IT decision-makers and business leaders, 46% of organizations are modernizing their workplaces and incorporating more technology to enhance the in-office experience, re-energize employees, and foster teamwork. Meeting spaces are receiving increased attention, with 40% of organizations reporting that they are creating additional meeting areas to support the collaborative needs of hybrid teams. Concurrently, 24% of organizations are optimizing their real estate to achieve greater efficiencies in hybrid work setups.

Q-SYS is leading the industry transition from traditional, one-dimensional workplace experiences to dynamic, intelligent environments that boost collaboration and productivity. The company has

demonstrated a high growth trajectory and has seen tremendous momentum for its solutions. Its growth has far surpassed the industry average because of its market-leading innovations and an unwavering focus on meeting evolving market needs. Its success in implementing high-impact spaces with solutions that add video, in addition to audio and control, has resulted in higher revenue per space, further feeding into its top line.

The software and cloud-centric architecture of the Q-SYS platform allows it to serve a wide variety of applications, including collaboration, wide area background music/performance, foreground audio support, video switching/distribution, wide area paging, device control and automation, and remote system monitoring and management, allowing it to target diverse implementations - far beyond any other competitor. These applications have allowed the company to provide solutions for meeting rooms, other collaboration spaces, and entertainment and ambient spaces for higher education, corporations, hospitality, government/judicial, large venues, and beyond. Its customer roster includes Berklee College of Music, Hard Rock International, Illinois University, Indiana University, IMD Business School, Atlantis Dubai, Pinterest, Resorts World, and Zillow. It continues to expand to support customers' needs globally: since the beginning of 2024, Q-SYS has opened new experience centers in Costa Mesa, CA; Dubai; Hong Kong; and Singapore with Bengaluru, India coming in 2H 2025.

Conclusion

Businesses clearly recognize the value of the physical workplace as a significant driver for innovation and collaboration. Building a high-performance workplace is essential to creating a future-ready, effective, and resilient operational environment. By seamlessly integrating spaces and technology, organizations can create dynamic, efficient, and user-centric work environments.

Q-SYS has stayed ahead of the market and leveraged emerging trends by developing a full-stack AV platform that unlocks the true potential of the modern workplace. Q-SYS has thus earned the 2025 Frost & Sullivan Global Technology Innovation Leadership Recognition for its market-leading innovation, enhancement of customer value, and superior execution capabilities.

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What You Need to Know about the Technology Innovation Leadership Recognition

Frost & Sullivan's Technology Innovation Leadership Recognition is its top honor and recognizes the market participant that exemplifies visionary innovation, market-leading performance, and unmatched customer care.

Best Practices Recognition Analysis

For the Technology Innovation Leadership Recognition, Frost & Sullivan analysts independently evaluated the criteria listed below.

Technology Leverage

Commitment to Innovation: Continuous emerging technology adoption and creation enables new product development and enhances product performance

Commitment to Creativity: Company leverages technology advancements to push the limits of form and function in the pursuit of white space innovation

Stage Gate Efficiency: Technology adoption enhances the stage gate process for launching new products and solutions

Commercialization: Company displays a proven track record of taking new technologies to market with a high success rate

Application Diversity: Company develops and/or integrates technology that serves multiple applications and multiple environments

Business Impact

Financial Performance: Strong overall business performance is achieved in terms of revenue, revenue growth, operating margin, and other key financial metrics

Customer Acquisition: Customer-facing processes support efficient and consistent new customer acquisition while enhancing customer retention

Operational Efficiency: Company staff performs assigned tasks productively, quickly, and to a high-quality standard

Growth Potential: Growth is fostered by a strong customer focus that strengthens the brand and reinforces customer loyalty

Human Capital: Leveraging innovative technology characterizes the company culture, which enhances employee morale and retention

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Best Practices Recognition Analytics Methodology

Inspire the World to Support True Leaders

This long-term process spans 12 months, beginning with the prioritization of the sector. It involves a rigorous approach that includes comprehensive scanning and analytics to identify key best practice trends. A dedicated team of analysts, advisors, coaches, and experts collaborates closely, ensuring thorough review and input. The goal is to maximize the company's long-term value by leveraging unique perspectives to support each Best Practice Recognition and identify meaningful transformation and impact.

		VALUE IMPACT	
STEP		WHAT	WHY
1	**Opportunity Universe**	Identify Sectors with the Greatest Impact on the Global Economy	Value to Economic Development
2	**Transformational Model**	Analyze Strategic Imperatives That Drive Transformation	Understand and Create a Winning Strategy
3	**Ecosystem**	Map Critical Value Chains	Comprehensive Community that Shapes the Sector
4	**Growth Generator**	Data Foundation That Provides Decision Support System	Spark Opportunities and Accelerate Decision-making
5	**Growth Opportunities**	Identify Opportunities Generated by Companies	Drive the Transformation of the Industry
6	**Frost Radar**	Benchmark Companies on Future Growth Potential	Identify Most Powerful Companies to Action
7	**Best Practices**	Identify Companies Achieving Best Practices in All Critical Perspectives	Inspire the World
8	**Companies to Action**	Tell Your Story to the World (BICEP*)	Ecosystem Community Supporting Future Success

*Board of Directors, Investors, Customers, Employees, Partners

About Frost & Sullivan

Frost & Sullivan is the Growth Pipeline Company™. We power our clients to a future shaped by growth. Our Growth Pipeline as a Service™ provides the CEO and the CEO's growth team with a continuous and rigorous platform of growth opportunities, ensuring long-term success. To achieve positive outcomes, our team leverages over 60 years of experience, coaching organizations of all types and sizes across 6 continents with our proven best practices. To power your Growth Pipeline future, visit Frost & Sullivan at http://www.frost.com.

The Growth Pipeline Generator™

Frost & Sullivan's proprietary model to systematically create ongoing growth opportunities and strategies for our clients is fueled by the Innovation Generator™.

Learn more.



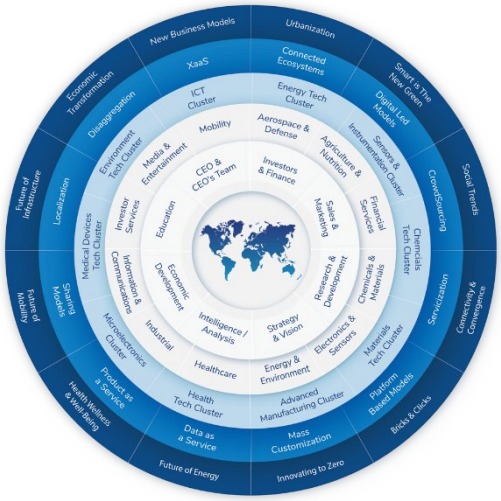
Key Impacts:

- **Growth Pipeline:** *Continuous Flow of Growth Opportunities*
- **Growth Strategies:** *Proven Best Practices*
- **Innovation Culture:** *Optimized Customer Experience*
- **ROI & Margin:** *Implementation Excellence*
- **Transformational Growth:** *Industry Leadership*

The Innovation Generator™

Our 6 analytical perspectives are crucial in capturing the broadest range of innovative growth opportunities, most of which occur at the points of these perspectives.

Analytical Perspectives:



- Megatrend (MT)
- Business Model (BM)
- Technology (TE)
- Industries (IN)
- Customer (CU)
- Geographies (GE)