22MILES
DIGITAL SIGNAGE & WAYFINDING

EMERGEN RESEARCH

2024-2032

Digital Signage Software Market

Trend Analysis and Forecasts till 2032

ABOUT US

Emergen Research is a market research and consulting company that provides syndicated research reports, customized research reports, and consulting services. Our solutions purely focus on your purpose to locate, target, analyze consumer behaviour shifts across demographics, across industries, and help client's make a smarter business decision. We offer market intelligence studies ensuring relevant and fact-based research across a multiple industries including Healthcare, Technology, Chemicals, Power, and Energy. We consistently update our research offerings to ensure our clients are aware about the latest trends existent in the market. Emergen Research has a strong base of experienced analysts from varied areas of expertise. Our industry experience and ability to develop a concrete solution to any research problems provides our clients the ability to secure an edge over their respective competitors.

TABLE OF CONTENTS

1.
MARKET SYNOPSIS

1.1.   MARKET DEFINITION

Digital signage software is a program that allows users to manage their digital signage content and screens. Users of digital signage software are able to plan content, make playlists, group their screens, and even identify playback problems that arise with remote screens. Images or movies are displayed on digital screens with the use of digital signage software. These assets are crucial to contemporary marketing and communication. Industries and businesses of all sizes commonly use it. In order to draw in a large audience by presenting informative content, digital signage is often placed in an indoor or outdoor setting.

1.2.   RESEARCH SCOPE & PREMISE

The report provides market value for base year 2023 and a yearly forecast from 2024 to 2033 in terms of revenue (USD Million). Market for each segment is present for North America, Europe & Asia Pacific regions for the above-mentioned forecast period.

Key industry dynamics, regulatory scenario, major industry dynamics and prospects are analyzed to understand their impact on demand for the forecast period. Growth rates have been estimated using correlation, regression, and time-series analysis.
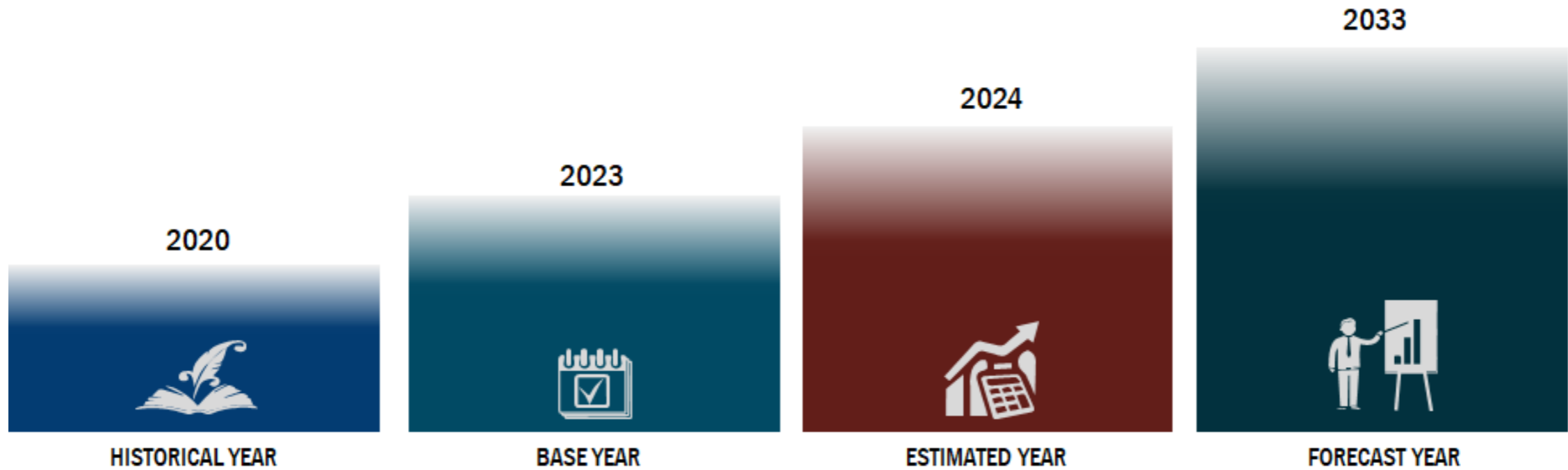
FIGURE 1.   YEARS CONSIDERED IN THE STUDY

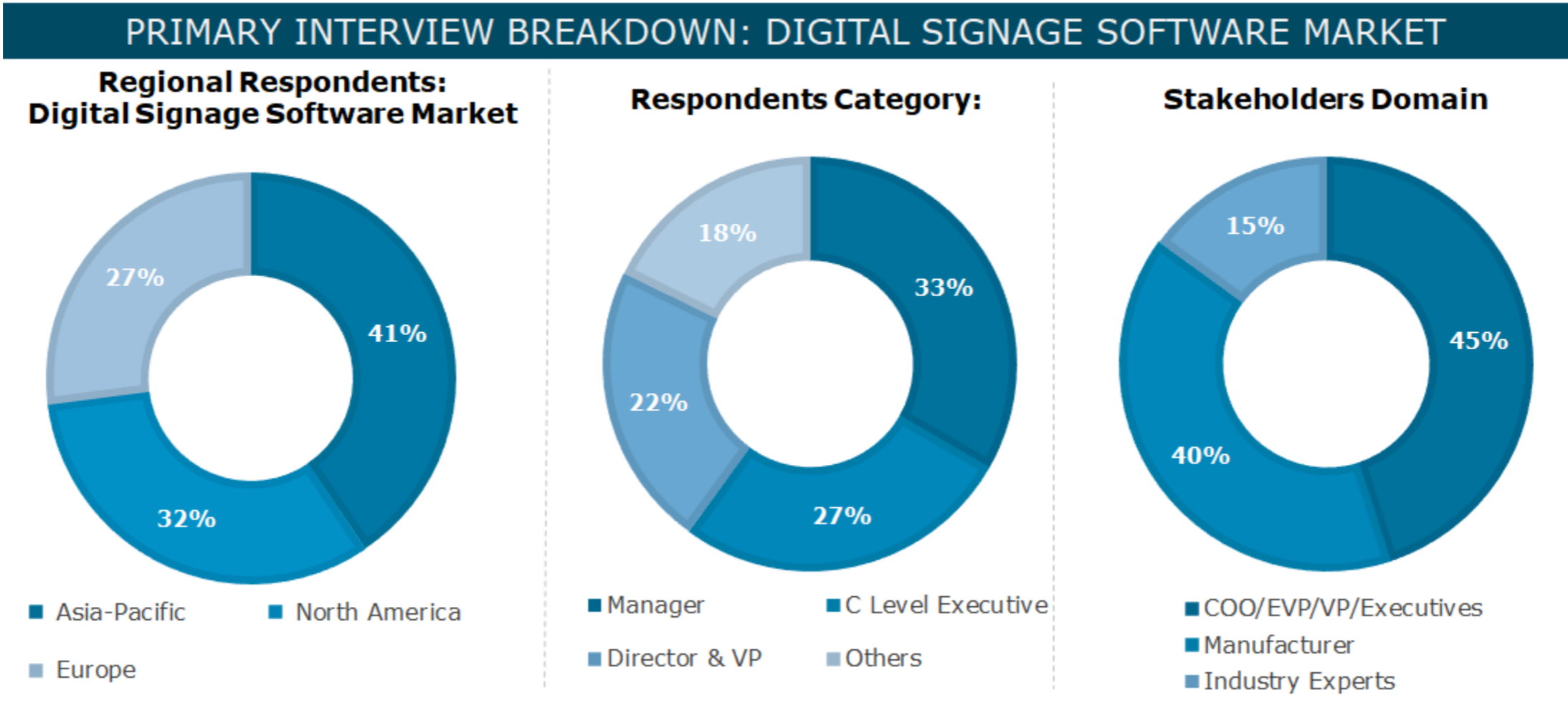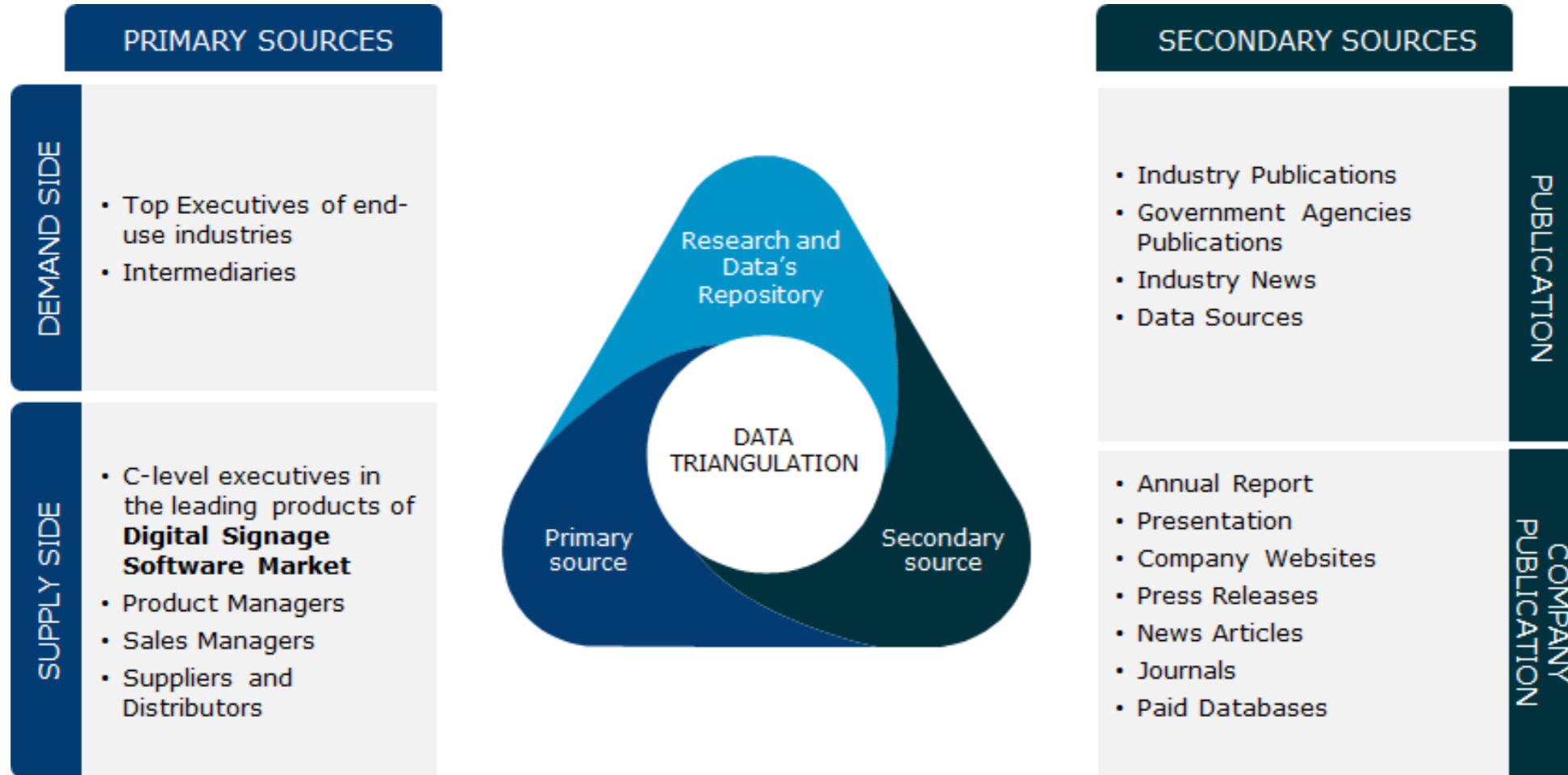**FIGURE 2.** PRIMARY INTERVIEW BREAKDOWN: DIGITAL SIGNAGE SOFTWARE MARKET

FIGURE 5.   DATA TRIANGULATION

PRIMARY SOURCES

DEMAND SIDE
- Top Executives of end-use industries
- Intermediaries

SUPPLY SIDE
- C-level executives in the leading products of **Digital Signage Software Market**
- Product Managers
- Sales Managers
- Suppliers and Distributors

Research and Data's Repository

DATA TRIANGULATION

Primary source

Secondary source

SECONDARY SOURCES

PUBLICATION
- Industry Publications
- Government Agencies Publications
- Industry News
- Data Sources

COMPANY PUBLICATION
- Annual Report
- Presentation
- Company Websites
- Press Releases
- News Articles
- Journals
- Paid Databases

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

2.
# DIGITAL SIGNAGE SOFTWARE MARKET OVERVIEW

2.1.   EXECUTIVE SUMMARY

The North America, Europe and Asia Pacific region-specific Digital Signage Software Market was valued at USD 2,137.6 Million in 2023 and is expected to grow at a CAGR of 27.9% in terms of value in the forecast period 2024 to 2033.
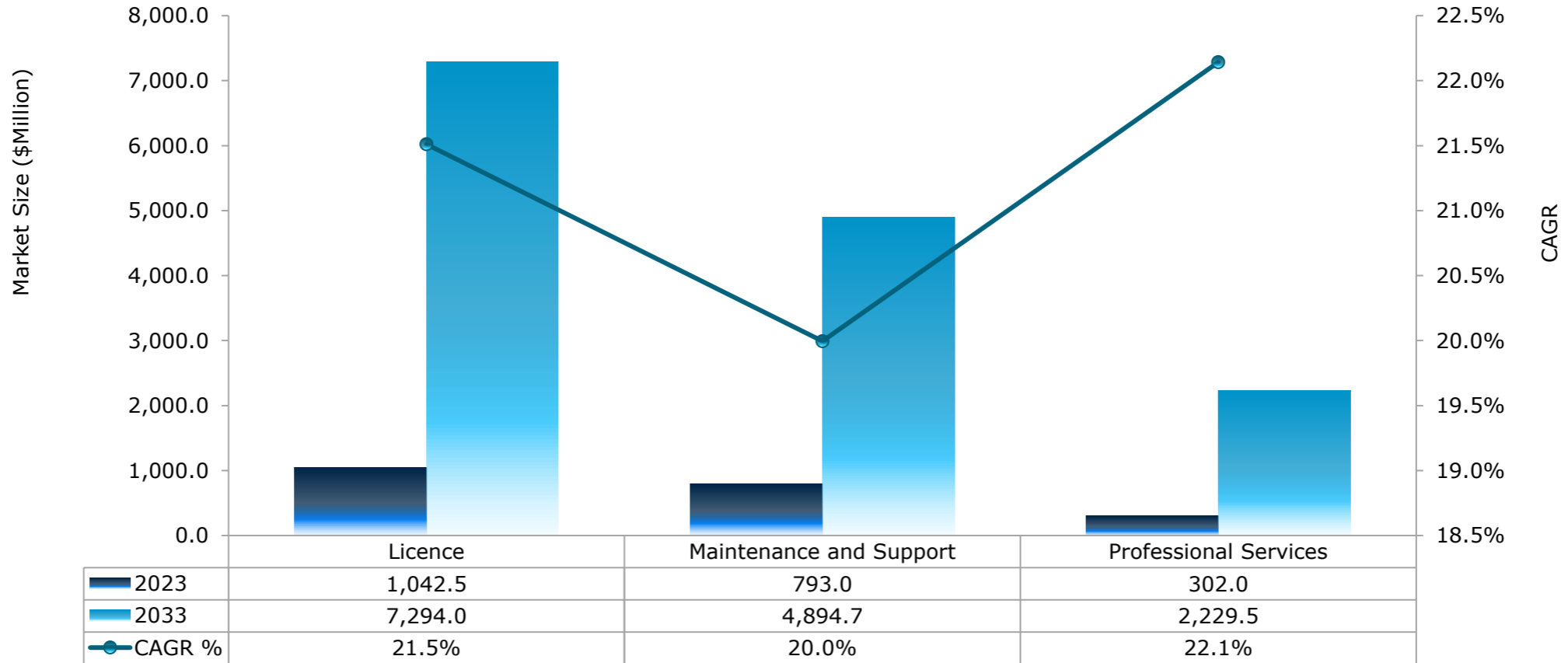
Digital signage software is used to manage and display digital content on various devices, such as digital billboards, video walls, kiosks, and interactive displays. This technology is widely used in several industries, including retail, healthcare, hospitality, transportation, and education. One of the key drivers of the digital signage software market is the increasing adoption of digital signage solutions in the retail sector. Retailers are leveraging digital signage technology to enhance their in-store customer experience by displaying targeted and engaging content. Furthermore, the growing popularity of online shopping is encouraging retailers to improve their in-store experience to attract customers, which is further boosting the demand for digital signage software. Moreover, the digital signage software market is closely linked with the content management system (CMS) market. CMS solutions are used to create, manage, and publish content for digital signage displays. These solutions are essential for ensuring that the content displayed on digital signage displays is relevant, engaging, and up to date. The integration of digital signage software with CMS solutions enables businesses to streamline their content management processes and deliver a seamless customer experience. In terms of regional growth, Asia Pacific is expected to emerge as the fastest-growing market for digital signage software. The region is witnessing rapid economic growth, increasing urbanization, and rising disposable incomes, which is driving the adoption of digital signage solutions across various industries.

FIGURE 6.   DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY CMS TYPE, 2023 & 2033 (USD MILLION)
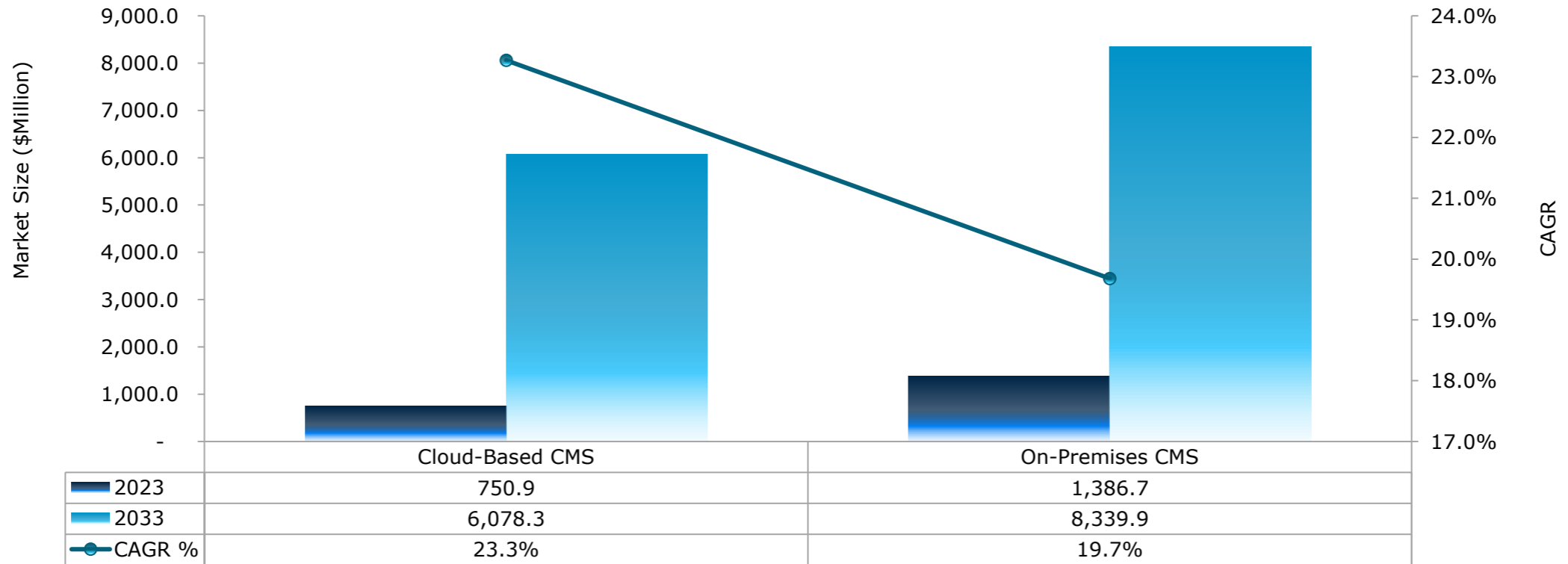
	Cloud-Based CMS	On-Premises CMS
2023	750.9	1,386.7
2033	6,078.3	8,339.9
CAGR %	23.3%	19.7%

FIGURE 7.   DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY SERVICE TYPE, 2023 & 2033 (USD MILLION)

	Licence	Maintenance and Support	Professional Services
2023	1,042.5	793.0	302.0
2033	7,294.0	4,894.7	2,229.5
CAGR %	21.5%	20.0%	22.1%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

FIGURE 8. DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY PRICING MODEL, 2023 & 2033 (USD MILLION)

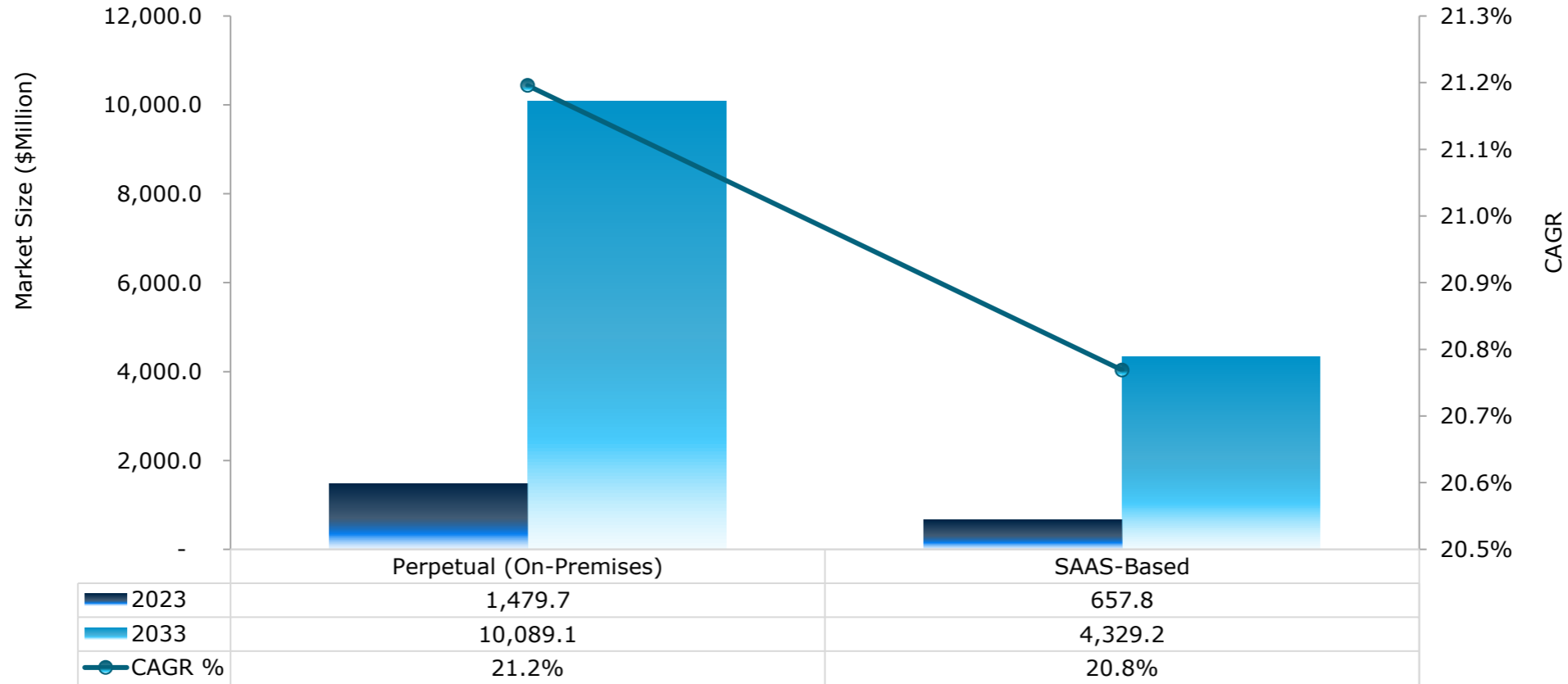|	Perpetual (On-Premises)	SAAS-Based
2023	1,479.7	657.8
2033	10,089.1	4,329.2
CAGR %	21.2%	20.8%

Source: *The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis*

FIGURE 9.   DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY ORGANIZATION SIZE, 2023 & 2033 (USD MILLION)

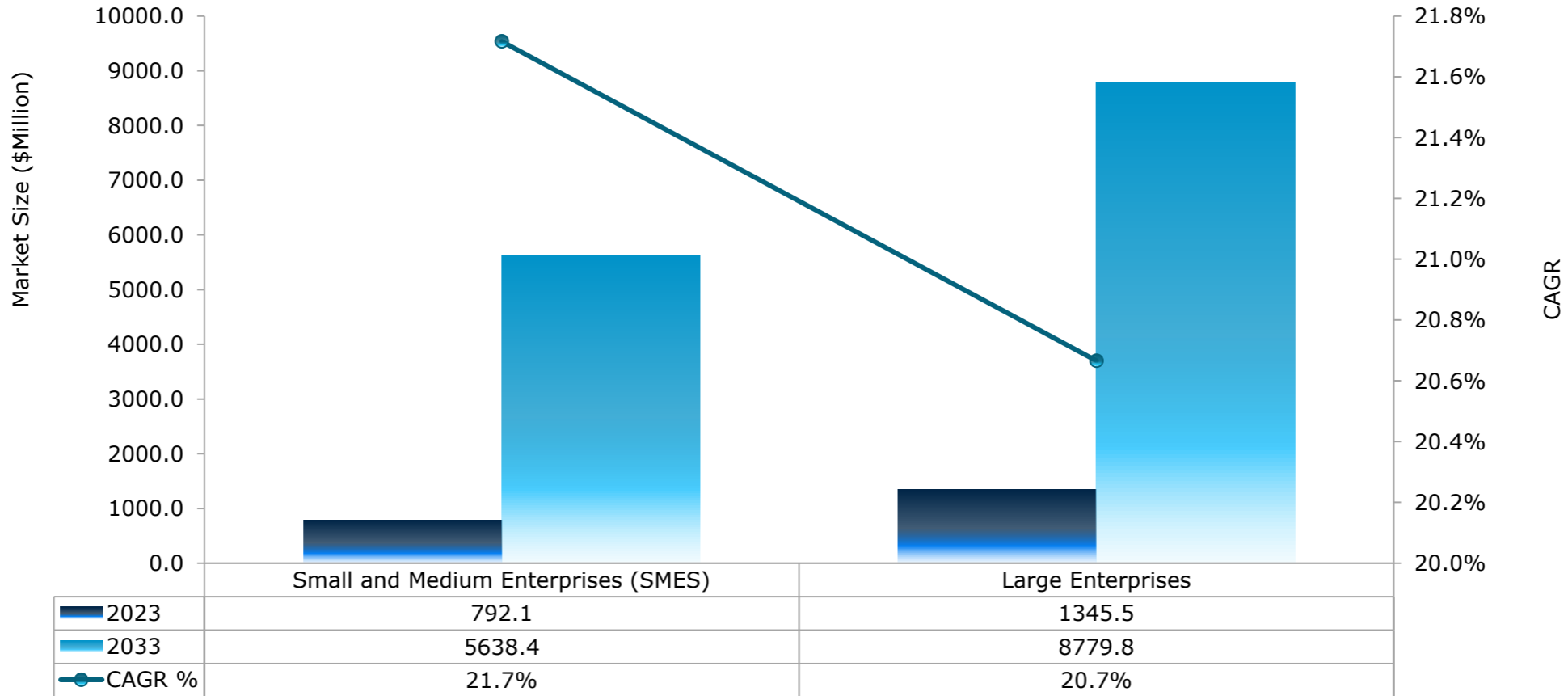|	Small and Medium Enterprises (SMES)	Large Enterprises
2023	792.1	1345.5
2033	5638.4	8779.8
CAGR %	21.7%	20.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

FIGURE 10. DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY INDUSTRY TYPE, 2023 & 2033 (USD MILLION)

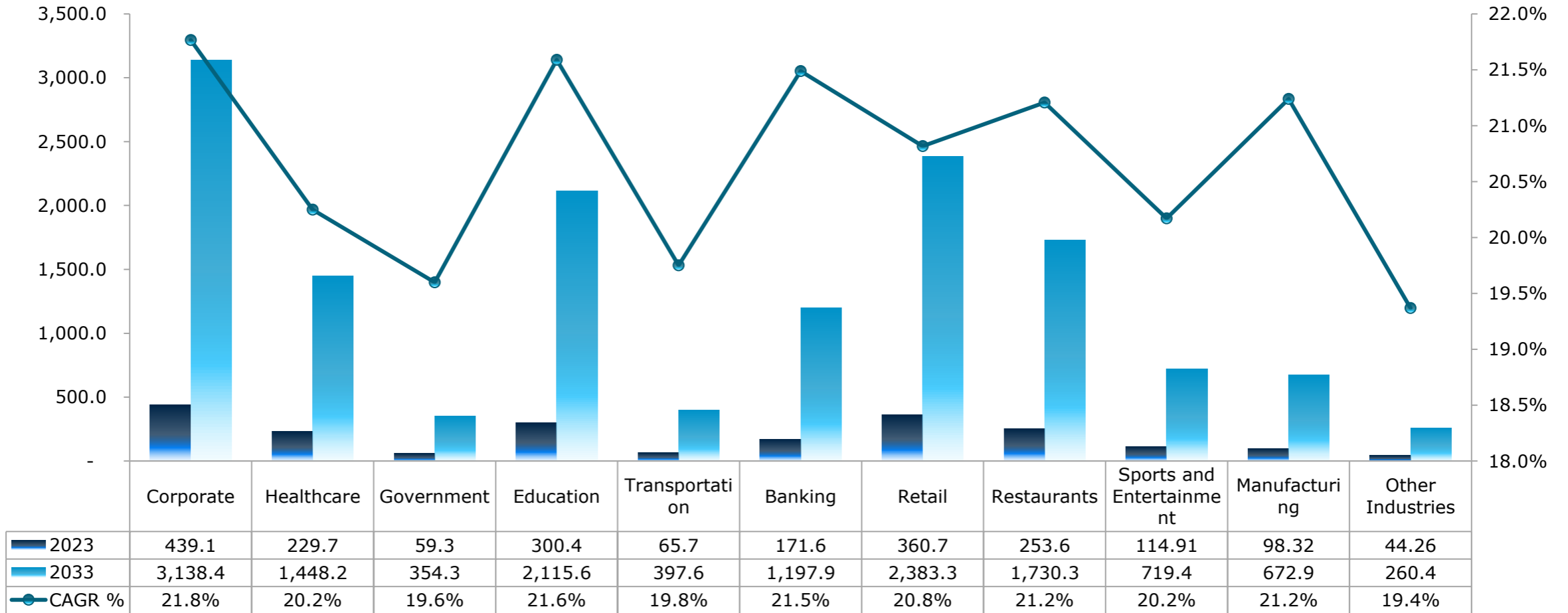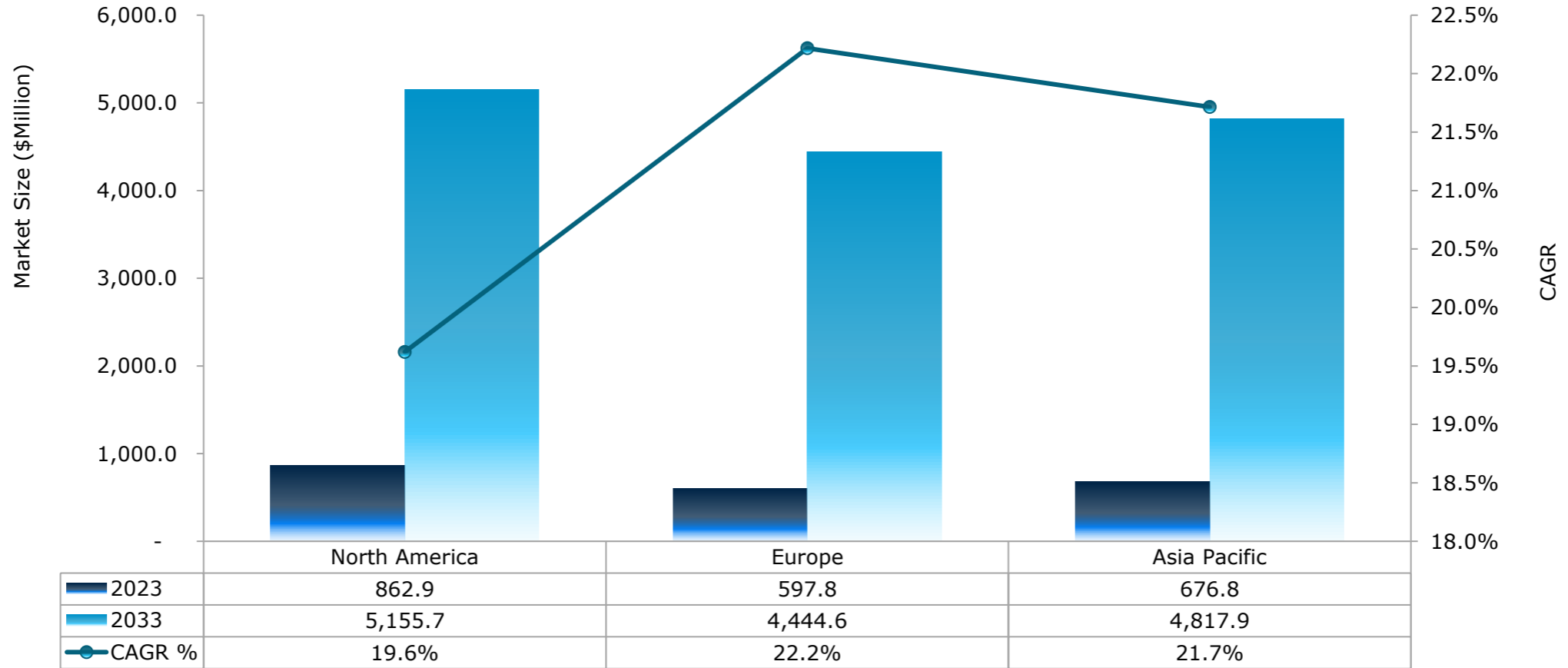|	Corporate	Healthcare	Government	Education	Transportation	Banking	Retail	Restaurants	Sports and Entertainment	Manufacturing	Other Industries
2023	439.1	229.7	59.3	300.4	65.7	171.6	360.7	253.6	114.91	98.32	44.26
2033	3,138.4	1,448.2	354.3	2,115.6	397.6	1,197.9	2,383.3	1,730.3	719.4	672.9	260.4
CAGR %	21.8%	20.2%	19.6%	21.6%	19.8%	21.5%	20.8%	21.2%	20.2%	21.2%	19.4%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

FIGURE 11.   DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY REGION, (USD MILLION)

	North America	Europe	Asia Pacific
2023	862.9	597.8	676.8
2033	5,155.7	4,444.6	4,817.9
CAGR %	19.6%	22.2%	21.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

Major companies in the market include –
- Scala
- Appspace Inc.
- Poppulo
- Hughes Network Systems, LLC
- Mvix Inc.
- Mood Media
- Navori Labs
- Visix, Inc
- 22Miles Inc.
- Zeta Display
- OneLan
- Carousel
- Tripleplay (Uniguest)
- NoviSign Digital Signage Inc
- Korbyt
- Skykit
- Signagelive

and Others

These companies are strengthening their market position and product offerings with collaborations, strategic development activities, and continuous research and development through employment of technological advancements in their facilities. They are adopting various organic and inorganic strategies such as new product developments, investments & expansions, mergers & acquisitions to strengthen their market shares. The players are also partnering with channel partners such as suppliers to ease their product accessibility.

3.
MARKET SEGMENTATION & IMPACT ANALYSIS

3.1. SEGMENTATION ANALYSIS

CMS Type

- On-Premise
- Cloud-Based

Pricing Model

- Perpetual License (On-Premise)
- SaaS-Based
  - Monthly Subscription
  - Annual Subscription

Service Type

- License
  - Player License
  - Web content license
- Maintenance Support
- Professional Services

Organization Size

- Small and medium-sized enterprises (SMEs)
- Large Enterprises

Industry Type

- Corporate
- Healthcare
- Government
- Education
- Entertainment Venues
- Transportation
- Banking
- Retail
- Restaurants
- Hospitality
- Manufacturing
- Other Industries

Region

- North America
- Europe
- Asia-Pacific

3.3. INDICATOR ANALYSIS

- Growth in corporate communication
- Transformation of retail industry
- Advancements in display technologies
- Rising adoption of cloud-based digital signage software
- Increasing use of digital signage software in transportation and healthcare industries
- Increased focus on customer engagement and experience
- Increasing demand for digital signage solutions

D DRIVERS

R RESTRAINTS
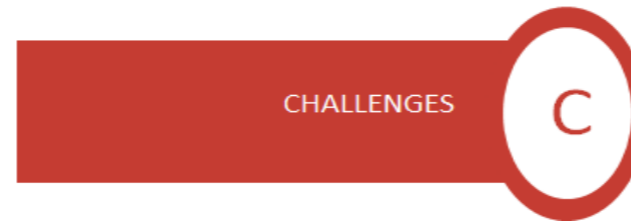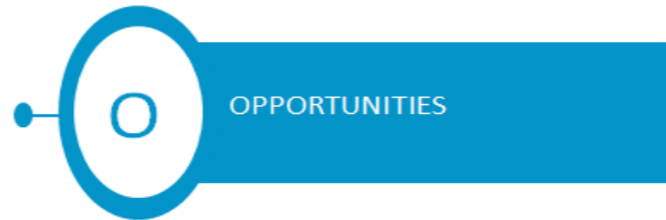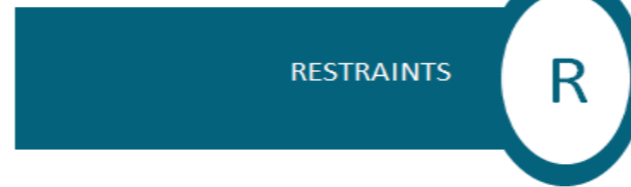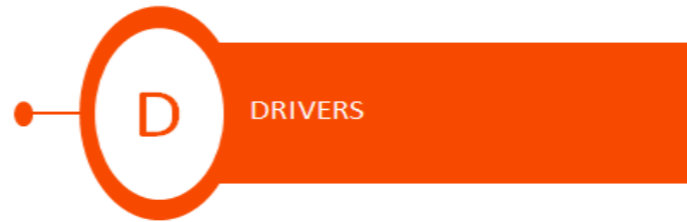
- High initial investment and installation costs
- Security and privacy concerns related to customer data
- Limited technical expertise and awareness among end-users
- Technical challenges related to software compatibility and integration with existing systems

- Integration of AI & ML

O OPPORTUNITIES

C CHALLENGES

- Concerns regarding implementation and proper maintenance

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

3.3.1. MARKET DRIVERS' ANALYSIS

DRIVERS	IMPACT	DRIVERS	IMPACT
• Growth in corporate communications	MEDIUM (LOW–HIGH)	• Increasing use of digital signage software in transportation and healthcare industries	MEDIUM (LOW–HIGH)
• Transformation of retail industry	MEDIUM (LOW–HIGH)	• Increased focus on customer engagement and experience	MEDIUM (LOW–HIGH)
• Advancements in display technologies	MEDIUM (LOW–HIGH)	• Increasing demand for digital signage solutions	MEDIUM (LOW–HIGH)
• Rising adoption of cloud-based digital signage software	MEDIUM (LOW–HIGH)		

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

3.3.1.1. GROWTH IN CORPORATE COMMUNICATIONS

The growth in corporate communications is playing a significant role in driving the adoption of digital signage within corporate environments. For instance, in today's digital age, people are increasingly drawn to visual content. Corporate communications teams are recognizing the power of visual communication to engage employees and deliver messages effectively. Digital signage provides a visually captivating medium to communicate important information, making it more likely to grab employees' attention and convey messages in a memorable way. In addition, traditional communication methods, such as email or printed materials, can be static and often require manual updates. However, corporate communications are becoming more dynamic and real-time, requiring instant dissemination of information. Digital signage allows for easy and immediate updates, enabling corporate communications teams to share the latest news, announcements, and updates in real-time across various locations within the organization.

3.3.1.2. TRANSFORMATION OF RETAIL INDUSTRY

The transformation of the retail industry is playing a significant role in driving the revenue growth of the digital signage market. As retailers adapt to changing consumer preferences and behaviors, they are increasingly leveraging digital signage solutions to enhance their in-store experiences and drive sales. Digital signage offers retailers the ability to deliver dynamic, targeted, and engaging content that captures the attention of shoppers and influences their purchasing decisions. By displaying product information, promotions, and interactive experiences, digital signage creates immersive and personalized customer journeys, thereby increasing customer engagement and loyalty. Moreover, the integration of advanced technologies such as AI, machine learning, and data analytics enables retailers to gather valuable insights about customer preferences, optimize content delivery, and tailor marketing strategies accordingly. As a result, the demand for digital signage solutions is growing rapidly as retailers recognize the potential for improved customer experiences and increased revenues in the evolving retail landscape. As the retail sector undergoes continuous transformation, it becomes evident that digital signage will have a progressively significant impact on shaping the future of in-store encounters. Retailers who adopt this technology and dedicate resources to developing captivating, informative, and interactive digital content will gain a

competitive edge in the dynamic retail environment. By harnessing the capabilities of digital signage, retailers can not only attract and retain customers but also obtain valuable data on their behaviors, resulting in more prosperous and enduring businesses.

3.3.1.3. ADVANCEMENTS IN DISPLAY TECHNOLOGIES

Display technology has witnessed significant improvements in resolution and sharp price drops during the past ten years. Display technologies have rapidly evolved over the years, enabling businesses and organizations to create more engaging and captivating visual experiences for their target audience. One key advancement is the development of high-resolution displays such as 4K and even 8K screens. Furthermore, the introduction of interactive touchscreens has revolutionized the way people interact with digital signage. Touch-enabled displays allow users to directly engage with the content, enabling interactive experiences, informational kiosks, and wayfinding solutions. Moreover, the emergence of flexible and curved displays has opened up new possibilities for creative and immersive installations. These displays can be bent or shaped to fit unique environments, enabling dynamic and visually striking digital signage setups. These displays offer stunning image quality with vibrant colors and sharp details, enhancing the overall visual appeal of digital signage.CRT screens, which were bulky, heavy, and power-hungry, have all but disappeared, giving way to ultra-flat LED, LCD, and plasma panels in all shapes and sizes. It seems logical to expect that "glasses-free 3D" screen technology will have a large impact on digital signage if it succeeds in the consumer electronics sector, hence recent advancements in 3D have been highlighted.

3.3.1.4. RISING ADOPTION OF CLOUD-BASED DIGITAL SIGNAGE SOFTWARE

Businesses frequently choose cloud-based digital signage for a variety of reasons. It is affordable, simple to use, and has a variety of features and advantages that make it a flexible choice for different types of enterprises. Digital signage that is cloud-based is a fantastic choice for companies of all sizes. It is ideal for small businesses who don't want to spend a lot of money on pricey hardware and software but still want to produce signs that looks professional. Larger companies benefit from it as well, because of the system's scalability. Because it has several advantages over conventional on-premise digital signage software, cloud-based digital signage software is well-liked. The first benefit is that businesses don't have to worry about updating their software or installing new upgrades

because cloud digital signage software is updated automatically. Cloud-based digital signage is being used by the retail sector to advertise sales and special deals as well as to display movies and slideshows of new products. It is being used by the healthcare sector to inform both personnel and patients. Digital signage is being used by hospitals and clinics to display videos about health and wellness as well as facts about the establishment. Overall, the rising adoption of cloud-based digital signage software provides businesses with cost-effective, scalable, and feature-rich solutions. The ability to manage and update content remotely, enhanced security, and the availability of real-time analytics are driving the growth of the digital signage software market as businesses recognize the value and convenience offered by cloud-based solutions.

3.3.1.5. INCREASING USE OF DIGITAL SIGNAGE SOFTWARE IN TRANSPORTATION AND HEALTHCARE INDUSTRIES

Healthcare businesses may quickly and affordably disseminate information by using digital signage. Employees in a medical contact center, for instance, can profit from digital displays that show real-time call statistics to support agents' maximal efficiency. Digital signage can also alert staff to changes to the building, internal information, or room scheduling. The ability of outpatients to locate radiology or other services as well as the patient's room using digital signage software is one of the most significant use cases for digital signs in hospitals. Patients and caregivers can discover where they need to go quickly and simply with the use of interactive wayfinding kiosks and directional signage screens, which will lessen stress and improve patient experiences. According to a survey conducted by Mvix, 83 percent of patients stated they interacted with a hospital's digital material for a significant length of time, and 78 percent said they actively look for healthcare digital signage when it is available. According to the same survey, shifting to digital messaging systems helps hospitals save around USD 8.1 billion annually, and 52% of patients acquire their health information from digital sources. Digital signage can be used by healthcare providers for donor acknowledgment, staff communications, patient management, and facility mapping. Additionally, they can utilize it for waiting room entertainment, hospital marketing, and instructional displays. Patients now have a comfortable and understandable communication route due to digital displays.

The increasing use of digital signage in the transportation industry has brought about significant benefits and is transforming the way information is communicated and managed within this sector. Digital signage is being adopted across various transportation modes, including airports, train stations, bus terminals, and even on-board vehicles. The entire organization can be displayed to the traveler through digital signage in the transportation industry. The South Korean transit covers make the best use of digital signs. Undoubtedly, digital signage in the transportation sector is sweeping the globe during this high-tech, quick-paced era. It is a result of several things, such as better client experiences, increased productivity, decreased expenses, and many other things. These tiny digital displays are nothing short of miracles. The effect created by static signs is now almost negligible. There are several pretty clear reasons why the audience is drawn more toward digital display boards. This kind of interactive technology encourages the moral uplift of a generation.

3.3.1.6. INCREASED FOCUS ON CUSTOMER ENGAGEMENT AND EXPERIENCE

An increased focus on customer engagement and experience is a key factor driving the growth and demand for the digital signage software market. Businesses across various industries are recognizing the importance of creating immersive and personalized experiences to attract and retain customers, and digital signage plays a vital role in achieving this objective. Interactive features in digital signage software further enhance customer engagement. Touchscreen displays enable users to actively interact with the content, providing a hands-on experience. This interactivity can include product demonstrations, virtual catalogs, and interactive wayfinding, allowing customers to explore and discover information in an intuitive manner. In summary, the increased focus on customer engagement and experience is a significant driving factor for the growth and demand of digital signage software. Its ability to deliver visually captivating content, provide customization options, offer interactivity, facilitate real-time updates, and provide valuable analytics makes it an indispensable tool for businesses looking to enhance customer engagement and create memorable experiences.

3.3.1.7.   INCREASING DEMAND FOR DIGITAL SIGNAGE SOLUTIONS

The demand for digital signage solutions is increasing rapidly due to several factors. One of the primary drivers is the need for businesses to deliver more engaging and interactive experiences to their customers. Digital signage solutions provide businesses with the ability to display dynamic content, such as videos, images, and animations, which can help to capture customers' attention and improve their overall experience. Another driver of the increasing demand for digital signage solutions is the growing adoption of mobile devices and the Internet of Things (IoT). The integration of digital signage displays with mobile devices and IoT sensors is enabling businesses to create more sophisticated and connected experiences for their customers. For example, a digital signage display in a retail store can use IoT sensors to detect when a customer is nearby and deliver personalized content to their mobile device. Moreover, the COVID-19 pandemic has also contributed to the growth of the digital signage software market. With the need for social distancing and limited physical contact, businesses are using digital signage solutions to communicate important information to their customers, such as safety guidelines, store hours, and contactless payment options.

3.4.   GROWTH FACTORS

Here are additional growth factors for the Digital Signage Software market and CMS Digital Signage, along with examples:

• **Integration with other technologies:** As digital signage becomes more integrated with other technologies, such as IoT and AI, it has the potential to become even more powerful. For example, digital signage displays can be used to display real-time data from sensors in a smart city, providing information about traffic patterns, air quality, and more.

• **Demand for personalized experiences:** Customers are increasingly expecting personalized experiences from businesses, and digital signage can help deliver on that expectation. For example, a restaurant might use digital signage displays to show personalized menus based on a customer's previous orders or dietary preferences.

• **Remote management capabilities:** The ability to manage digital signage content remotely has become increasingly important, especially as businesses expand their digital signage networks. CMS Digital Signage solutions, such as NoviSign, offer cloud-based platforms that allow users to manage and update content from anywhere with an internet connection.

• **Rising adoption of smart signage:** As the Internet of Things (IoT) continues to grow, smart signage is becoming more prevalent. These displays can be connected to the internet, allowing for real-time updates and remote management. For example, a smart digital signage display in a hospital could show real-time wait times for different departments.

• **Increasing adoption of digital menus:** Digital menus have become increasingly popular in the restaurant industry, offering benefits such as increased efficiency and flexibility. CMS Digital Signage solutions can help manage these menus, allowing for easy updates and changes.

Overall, the Digital Signage Software market and CMS Digital Signage specifically are being driven by a combination of technological advancements, changing customer expectations, and a growing need for personalized, data-driven experiences. As businesses continue to invest in digital signage solutions, the market is expected to continue to grow and evolve.
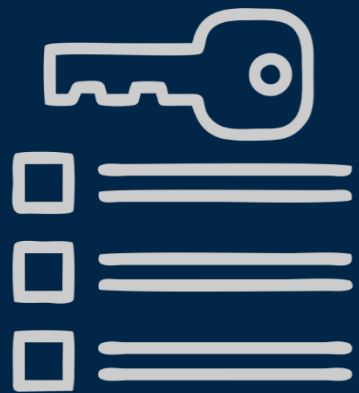
4.

DIGITAL SIGNAGE MARKET – INNOVATION & TECHNOLOGICAL TRENDS

4.1. TECHNOLOGICAL TRENDS

The digital signage software market is a rapidly expanding industry that provides businesses with the ability to display and manage digital content on various devices.

- **ChatGPT:** Integrating ChatGPT into digital signage and interactive displays offers the advantage of heightened customer engagement. By understanding and responding to user input, ChatGPT enables personalized interactions, leading to increased satisfaction and brand loyalty. It provides businesses with an effective means of communicating with their audience, resulting in improved customer retention.

- **Cloud-based digital signage software:** Cloud-based digital signage software is a growing trend due to its remote management capabilities, easy updates, scalability, and cost-effectiveness. It eliminates the need for on-site servers, simplifies deployment, and ensures consistent performance, making it an ideal solution for businesses seeking flexible and efficient digital signage management.

- **Artificial Intelligence (AI):** AI-powered digital signage software leverages artificial intelligence algorithms to deliver personalized content, analyze audience data, and automate content creation. It enhances engagement by tailoring messages to individual preferences, improving the effectiveness of advertising campaigns, and providing real-time insights into customer behavior, ultimately creating more immersive and targeted digital signage experiences. Facial recognition is one of the major applications of AI in digital signage. Screens may automatically adjust material to the person in front of them thanks to facial recognition technology. For instance, customized advertising messages may be shown.

  - **Video analytics:** The use of video analytics allows for the measurement of audience engagement and the effectiveness of content. Businesses can obtain comprehensive metrics regarding the performance of specific content showcased on digital signage. These metrics encompass valuable data points such as impressions, views, interactions, and conversions. By

scrutinizing and analyzing these metrics, businesses can evaluate the effectiveness of their content, and employ data-driven decision-making to enhance future content strategies.

- **Audience analytics:** Using artificial intelligence to analyze real-time audience data, audience analytics determines what content and messages can be offered in the future. It provides detailed information about the style, length, platform, and timing of the message that a particular audience may understand. Digital signage can provide bi-directional information transmission when combined with a camera. As a user scrolls through the content on the screen, a camera tracking him captures information about his eye movements, including his preferences. For instance, businesses can deploy cameras at strategic locations throughout trade events or advertising shows. They are able to precisely follow the frontal faces of the audience, recording their mood, level of interest, and even quick changes in expression while they listen to a presentation. Additionally, it can accurately quantify the number of attendees that arrived at the event location but did not participate in any events or presentations.

- **Internet of Things (IoT):** IoT-connected digital signage integrated with digital signage displays to gather real-time data and provides dynamic content updates. IoT ensors can detect sevral attributes or factors such as temperature, humidity, or ambient light, allowing the signage system to adapt its content based on the audience or surroundings. Also, it deivers deliver personalized and contextually relevant content, such as consumer preferences, behaviors, and location. This data can be leveraged to deliver personalized and contextually relevant.

- **Innovations in Touchscreen technologies leading to interactive digital signage:** One of the prevailing trends in interactive digital signage is the use of touchscreens. Touch displays displays allow consumers to interact directly with the content by tapping or zooming. Touchscreen interactivity facilitates intuitive navigation, enabling consumer to access relevant information, browse products, or make selections. Over the years, touchscreen technology has continued to grow, and new developments are making it even more potent and adaptable. For instance, multi-touch screen features let users interact with several things on the screen at once, creating

an immersive environment. Devices that use haptic feedback technology can imitate actual touch sensations, making the experience more realistic and interesting.

- **Mobile integration:** The integration of mobile devices with digital signage allows for personalized content delivery and can increase engagement with customers. QR codes and NFC technology enable businesses to bridge the gap between offline and online experiences, driving customer engagement. QR codes and NFC technology is an growing trend in digital signage market. Stores can display QR codes or NFC tags on the signage, which users can scan or tap using their mobile devices. This interaction can provide access to exclusive offers, product details, or promotional content.

- **Augmented Reality (AR):** AR can be used to enhance the customer experience by overlaying digital content on the physical environment. AR integrated into digital signage enables businesses to deliver captivating and interactive brand experiences to customers. By overlaying virtual content onto the physical environment, businesses can create immersive and engaging interactions that leave a lasting impact. Consumers can utilize AR-enabled displays to virtually try on clothing, visualize products in their own surroundings, or engage with virtual characters.

- **Digital signage content management:** Advanced content management systems allow for the creation, scheduling, and distribution of content across multiple screens and locations. Business can leverage cloud-based solution, also can effortlessly adjust scale of their digital signage networks without requiring additional investments in infrastructure. This scalability empowers businesses to expand their signage deployments to multiple locations or make necessary adjustments to the number of displays as per their requirements.

- **6G connectivity:** 6G connectivity expected to bring a groundbreaking transformation to the digital signage software sector. The combination of swifter connectivity upgraded functionalities such as augmented reality (AR) and virtual reality (VR), and the integration of artificial intelligence (AI) and machine learning (ML) will empower businesses and tailored interactions for their consumers. Another

characteristic of 6G is intelligence, where the edge and core of the innovative network will need to be intelligent about how to increase traffic. Machine learning (ML), a subset of AI, and artificial intelligence (AI) are prerequisites for 6G. Given an intelligent network capable of processing Big Data in close to real-time and optimizing network traffic prioritization based on Network Slicing and other particular KPIs, AI and ML will play a key role. A 6G QoS for future multimedia applications are being researched and proposed in order to ensure great QoE for 6G customers. Planning for the advanced 6G NextGen-MEC supported by AI and QML will be essential for a successful QoE for the advanced video and picture applications in order to meet those demands. Additionally, every 6G user's device for 6G networks must have an inbuilt QoS probe in order to give feedback regarding the QoE health status (UX) to the intelligent 6G C-RAN for altering the user's experience almost instantly. Additional research has been done in this area at the 6G Home Lab at Aarhus University in Denmark.

4.2. CURRENT INNOVATIONS

TABLE 2. CURRENT INNOVATIONS

INNOVATION	DESCRIPTION
● **Voice-activated digital signage**	With the increasing popularity of voice assistants, there is a trend towards integrating voice-activated digital signage. This can allow customers to interact with displays using their voice, creating a more hands-free and user-friendly experience. For example, McDonald's has tested voice-activated drive-thru menus in some locations.
● **Content personalization using facial recognition**	Facial recognition technology can be used to personalize content based on the viewer's demographics and preferences. For example, a digital signage display in a clothing store could use facial recognition to determine the viewer's age and gender and display content tailored to their demographic.
● **Gesture recognition**	Gesture recognition technology is an interesting advancement in the digital signage business. Users can engage with digital signage displays without physically touching them by detecting and interpreting human motions. Gesture recognition technology allows users to control and manipulate on-screen material with movements such as swiping, pinching, rotating, or dragging. This simple interaction style increases user engagement and creates a more immersive experience.

● **Data integration**	Integrating third-party data into digital signage systems empowers businesses to deliver tailored advertisements to precise audience segments based on factors like demographic information and user preferences is a major innovation in this market. This capability ensures presentation of current and pertinent information that aligns with the audience's desires and requirements. Furthermore, digital signage platforms seamlessly connect with multiple real-time data sources, including weather updates, news feeds, social media APIs, traffic information, and live event data. This integration is made possible through the utilization of application programming interfaces (APIs) and web services, enabling effective communication between digital signage systems and external data sources
● **Virtual try-on technology**	Virtual try-on technology allows customers to see how a product will look on them without physically trying it on. This can be used in applications such as cosmetics, eyewear, and apparel. For example, Sephora has implemented virtual try-on technology in some of their stores using digital displays and augmented reality
● **Gamification**	Gamification can be used to increase engagement with digital signage displays. For example, a digital signage display in a shopping mall could use gamification to encourage customers to visit different stores and complete challenges in exchange for discounts or prizes
● **Real-time translation**	Real-time translation technology can be used to display content in multiple languages, making digital signage displays more accessible and user-friendly for international audiences.

● **Holographic displays**	Holographic displays use a combination of mirrors, lasers, and projection technology to create 3D images that appear to be floating in space. This technology can create a visually stunning and attention-grabbing experience for viewers. For example, Audi has used holographic displays in some of their showrooms to showcase their vehicles in a unique and immersive way.

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

.

5.
DIGITAL SIGNAGE SOFTWARE MARKET BY CMS TYPE INSIGHTS & TREND

KEY TRENDS & HIGHLIGHTS

- The demand of cloud-based CMS segment accounted for over USD 750.9 million in 2023 and is expected to grow at a rate of 23.3% in the forecast period.

5.1.   CMS TYPE DYNAMICS & MARKET SHARE, 2023 & 2033

By CMS Type, the market is segmented into cloud-based CMS, and on-premises CMS.

FIGURE 12.   DIGITAL SIGNAGE SOFTWARE MARKET: CMS TYPE DYNAMICS (REVENUE IN USD MILLION)
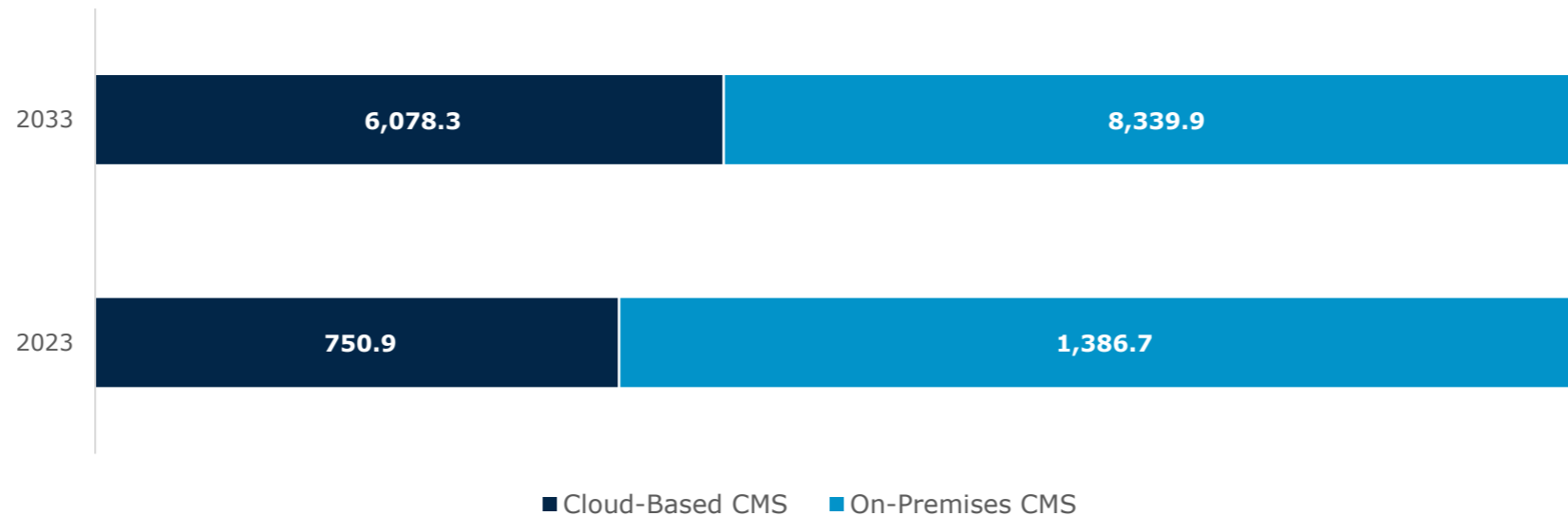
| | 2033 | 6,078.3 | 8,339.9 |
| 2023 | 750.9 | 1,386.7 | |

■ Cloud-Based CMS   ■ On-Premises CMS

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

5.2. CLOUD-BASED CMS

With a cloud-based CMS, users can create, manage, and distribute content for their digital signage displays from anywhere with an internet connection, using a web-based interface. The content, including images, videos, text, and other media elements, is stored and managed in the cloud, eliminating the need for on-premises servers or storage. A cloud-based CMS provides a centralized platform for managing content across multiple digital signage displays or locations. Users can create content, organize playlists, and schedule content distribution from a single interface. Cloud-based CMS often enables collaboration features, allowing multiple users or teams to work together on content creation and management. This is particularly useful for organizations with distributed teams or multiple stakeholders involved in the signage deployment. With a cloud-based CMS, software updates and enhancements are typically handled by the service provider. Users benefit from automatic updates, ensuring they have access to the latest features and improvements without the need for manual installations. Cloud-based CMS platforms often offer robust data and analytics capabilities. Users can track the performance of their digital signage campaigns, gather audience insights, and measure the effectiveness of their content using built-in analytics tools.

5.2.1. DIGITAL SIGNAGE SOFTWARE MARKET BY CLOUD-BASED CMS, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 4. DIGITAL SIGNAGE SOFTWARE MARKET BY CLOUD-BASED, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	375.7	463.0	569.5	750.9	924.9	1,139.9	1,731.4	2,134.0	3,242.6	3,997.7	4,928.9	6,078.3	23.3%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

5.2.2. DIGITAL SIGNAGE SOFTWARE MARKET BY CLOUD-BASED, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 5. DIGITAL SIGNAGE SOFTWARE MARKET BY CLOUD-BASED, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	139.4	170.6	208.2	272.6	332.8	406.8	607.7	742.7	1,109.6	1,356.3	1,658.1	2,027.1	22.2%
Europe	107.0	132.8	164.2	217.5	269.9	334.6	514.2	637.4	979.5	1,214.4	1,505.4	1,866.6	24.0%
Asia Pacific	129.3	159.6	197.0	260.7	322.3	398.5	609.6	753.9	1,153.5	1,427.0	1,765.4	2,184.6	23.7%
Total	375.7	463.0	569.5	750.9	924.9	1,139.9	1,731.4	2,134.0	3,242.6	3,997.7	4,928.9	6,078.3	23.3%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

5.3.   ON-PREMISES CMS

With an on-premises CMS, all data and content are stored on the user's own servers, providing a higher level of data security and control. This can be particularly important for organizations that handle sensitive or confidential information. By hosting the CMS on their own servers, businesses can maintain complete control over their personal data and have a higher level of confidence in its security. It allows users to operate their digital signage network without relying on an internet connection. This can be beneficial in areas with limited or unreliable internet access, ensuring continuous operation of the digital signage system. Since the CMS is hosted locally, users have more flexibility and customization options. They can tailor the CMS to meet their specific requirements, integrate it with existing systems, and adapt it to their infrastructure. While there may be initial setup and maintenance costs associated with on-premises CMS, in the long run, it can be more cost-effective for organizations with large-scale deployments. It eliminates recurring monthly fees typically associated with cloud-based solutions. Individuals with technical expertise or a desire for customization may opt for an on-premises CMS. They can tailor the CMS to their specific needs, implement unique features, and create a personalized digital signage experience.

5.3.1. DIGITAL SIGNAGE SOFTWARE MARKET BY ON-PREMISES CMS, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 6. DIGITAL SIGNAGE SOFTWARE MARKET BY ON-PREMISES CMS, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	764.3	911.6	1,085.7	1,386.7	1,655.6	1,978.3	2,828.1	3,383.3	4,848.0	5,806.6	6,957.7	8,339.9	19.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

5.3.2. DIGITAL SIGNAGE SOFTWARE MARKET BY ON-PREMISES CMS, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 7. DIGITAL SIGNAGE SOFTWARE MARKET BY ON-PREMISES CMS, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	336.8	397.2	467.4	590.3	695.4	820.7	1,144.3	1,352.0	1,889.2	2,234.4	2,643.5	3,128.6	18.2%
Europe	201.8	244.0	294.4	380.3	460.7	557.4	816.4	988.4	1,449.4	1,755.6	2,127.3	2,578.0	21.1%
Asia Pacific	225.6	270.4	323.9	416.1	499.6	600.3	867.3	1,043.0	1,509.4	1,816.6	2,186.9	2,633.4	20.3%
Total	764.3	911.6	1,085.7	1,386.7	1,655.6	1,978.3	2,828.1	3,383.3	4,848.0	5,806.6	6,957.7	8,339.9	19.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.

DIGITAL SIGNAGE SOFTWARE MARKET BY SERVICE TYPE INSIGHTS & TREND

KEY TRENDS & HIGHLIGHTS

■ The demand of professional services segment accounted for over USD 302.0 million in 2023 and is expected to grow at a rate of 22.1% in the forecast period.

6.1. SERVICE TYPE DYNAMICS & MARKET SHARE, 2023 & 2033

By Service Type, the market is segmented into license, maintenance and support, and professional services. License is sub-segmented into player license, and web content license.

FIGURE 13. DIGITAL SIGNAGE SOFTWARE MARKET: SERVICE TYPE DYNAMICS (REVENUE IN USD MILLION)
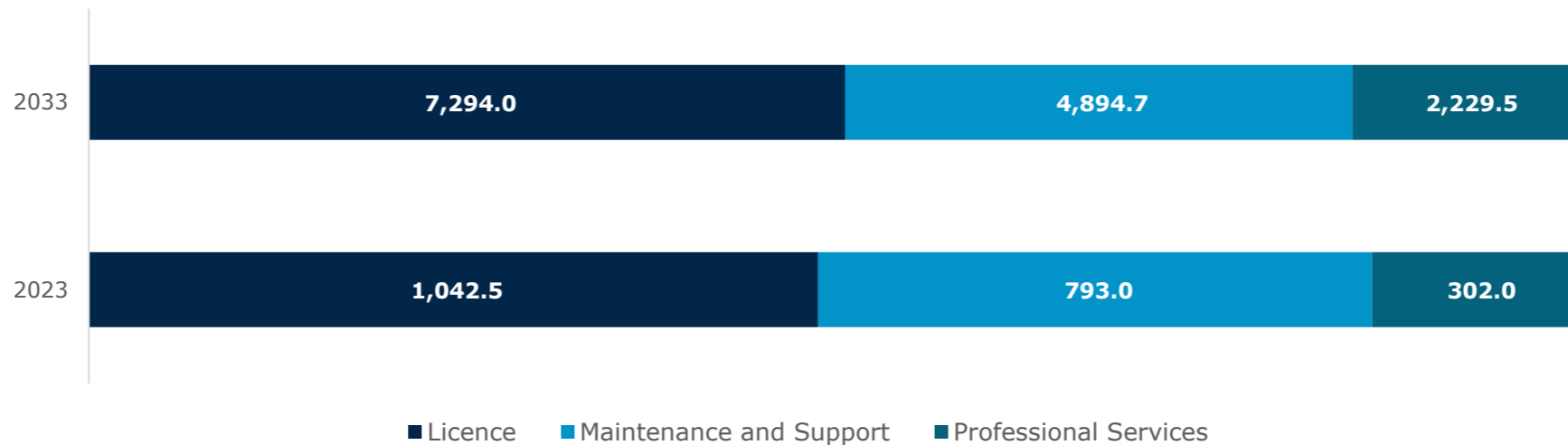
	Licence	Maintenance and Support	Professional Services
2033	7,294.0	4,894.7	2,229.5
2023	1,042.5	793.0	302.0

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.2. LICENSE

License service-based models, such as subscription licenses, provide users with flexibility in terms of scalability and usage. Users can easily adjust the number of licenses or subscriptions based on their needs, whether they want to add or remove licenses as their digital signage network evolves. License service-based models often include regular updates and access to new features. Users can benefit from the latest advancements and enhancements in the software without additional costs or complex upgrade processes. This ensures that their digital signage solution remains up-to-date and competitive in the market. These models often include support and maintenance as part of the subscription or license fee. Users can rely on the software provider for technical assistance, troubleshooting, and bug fixes. This support can be crucial for smooth operation and resolving issues promptly.

Many licenses service-based models are cloud-based, which offers advantages such as easy accessibility from any location, centralized management, automatic backups, and simplified software updates. Users can access their digital signage content and management tools from anywhere with an internet connection, which is especially useful for remote teams or multi-location deployments. License service-based models often provide free trials or evaluation periods, allowing users to test the software and assess its suitability for their specific needs. This helps users make informed decisions about the software's functionality, ease of use, and compatibility with their existing infrastructure before committing to a paid license or subscription.

6.2.1. DIGITAL SIGNAGE SOFTWARE MARKET BY LICENSE, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 8. DIGITAL SIGNAGE SOFTWARE MARKET BY LICENSE, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	549.5	665.0	803.9	1,042.5	1,263.1	1,532.1	2,257.0	2,741.3	4,049.2	4,924.5	5,992.0	7,294.0	21.5%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.2.2. DIGITAL SIGNAGE SOFTWARE MARKET BY LICENSE, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 9. DIGITAL SIGNAGE SOFTWARE MARKET BY LICENSE, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	225.6	270.1	323.0	414.4	496.0	594.8	856.7	1,028.8	1,486.1	1,787.3	2,150.7	2,589.2	20.2%
Europe	150.3	183.9	224.5	293.5	359.7	440.4	660.7	809.5	1,216.2	1,491.3	1,829.2	2,244.3	22.6%
Asia Pacific	173.5	211.0	256.4	334.5	407.4	496.9	739.7	902.9	1,346.9	1,645.9	2,012.1	2,460.5	22.1%
Total	549.5	665.0	803.9	1,042.5	1,263.1	1,532.1	2,257.0	2,741.3	4,049.2	4,924.5	5,992.0	7,294.0	21.5%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.2.3.   PLAYER LICENSE

With the player license model, users can centrally manage and control multiple screens or displays from a single media player. Centralized management allows for streamlined content distribution, scheduling, and updates across the network. It simplifies the administration process and ensures consistency in content playback. The player license model offers scalability and flexibility for expanding or adding screens to a digital signage network. Users can easily acquire additional Licenses for new media players as they grow their network, without needing to purchase individual Licenses for each screen. This scalability enables efficient network expansion without excessive licensing costs. The licensing structure for player Licenses can vary among different digital signage software providers. Some providers offer a flat fee per media player license, while others may have tiered pricing based on the number of media player Licenses required.

It's important to understand the licensing structure and any potential limitations or restrictions associated with the player Licenses. Many player license models include remote management capabilities, allowing users to monitor and control their digital signage network from a central location. Users can remotely update content, adjust settings, and troubleshoot issues without physically accessing each screen or media player. This remote management functionality enhances efficiency and reduces maintenance costs. Player license models often integrate with various software systems or third-party applications. This integration capability allows users to leverage additional features, such as content scheduling, data integration, analytics, and dynamic content generation. These integrations can enhance the functionality and effectiveness of the digital signage network.

6.2.3.1. DIGITAL SIGNAGE SOFTWARE MARKET BY PLAYER LICENSE, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 10. DIGITAL SIGNAGE SOFTWARE MARKET BY PLAYER LICENSE, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	345.1	416.3	501.7	648.5	783.4	947.2	1,386.6	1,678.9	2,464.6	2,987.8	3,624.2	4,398.0	21.1%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.2.3.2. DIGITAL SIGNAGE SOFTWARE MARKET BY PLAYER LICENSE, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 11. DIGITAL SIGNAGE SOFTWARE MARKET BY PLAYER LICENSE, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	143.7	171.4	204.3	261.1	311.4	372.1	531.9	636.4	912.4	1,093.2	1,310.4	1,571.5	19.7%
Europe	93.6	114.3	139.2	181.6	221.9	271.1	404.8	494.8	739.8	904.9	1,107.3	1,355.3	22.3%
Asia Pacific	107.7	130.6	158.3	205.8	250.0	304.0	449.9	547.7	812.4	989.8	1,206.5	1,471.2	21.8%
Total	345.1	416.3	501.7	648.5	783.4	947.2	1,386.6	1,678.9	2,464.6	2,987.8	3,624.2	4,398.0	21.1%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.2.4.   WEB CONTENT LICENSE

The web content License model enables users to display real-time information and dynamic content from the web on their digital signage screens. This can include news feeds, social media updates, weather forecasts, live data, or any web-based content that can be integrated into the signage display. It allows for more engaging and up-to-date content experiences. With web content, users can easily update and change the displayed information without manually creating and uploading new content files. This flexibility is beneficial when the displayed information needs to be frequently updated, such as menus, pricing, schedules, or promotions. Users can make updates on the web server, and the changes will be reflected on the digital signage screens in real-time. With the web content License model, users can manage and control their digital signage content from a central web-based interface. They can access the web-based dashboard or content management system to schedule content, configure layouts, monitor screen status, and make changes remotely. Centralized management simplifies content administration and ensures consistent branding and messaging across multiple screens.

Web content License models often support integration with various web services, APIs, and external systems. This enables the incorporation of data from external sources, such as inventory systems, booking platforms, or content syndication services, into the digital signage display. It allows for a more personalized and contextualized content experience. The web content License model supports the integration of rich media elements, such as videos, interactive maps, social media feeds, or web-based applications. This allows for more immersive and interactive experiences on the digital signage screens, enhancing user engagement and capturing attention.

6.2.4.1. DIGITAL SIGNAGE SOFTWARE MARKET BY WEB CONTENT LICENSE, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 12. DIGITAL SIGNAGE SOFTWARE MARKET BY WEB CONTENT LICENSE, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	204.4	248.7	302.2	393.9	479.8	584.9	870.4	1,062.4	1,584.6	1,936.7	2,367.8	2,896.1	22.1%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.2.4.2. DIGITAL SIGNAGE SOFTWARE MARKET BY WEB CONTENT LICENSE, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 13. DIGITAL SIGNAGE SOFTWARE MARKET BY WEB CONTENT LICENSE, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	81.9	98.7	118.7	153.3	184.6	222.7	324.8	392.4	573.7	694.2	840.3	1,017.7	20.9%
Europe	56.7	69.6	85.3	112.0	137.7	169.3	255.9	314.7	476.4	586.4	721.9	889.0	23.0%
Asia Pacific	65.8	80.4	98.2	128.7	157.4	192.9	289.8	355.3	534.5	656.2	805.6	989.4	22.7%
Total	204.4	248.7	302.2	393.9	479.8	584.9	870.4	1,062.4	1,584.6	1,936.7	2,367.8	2,896.1	22.1%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.3.   MAINTENANCE AND SUPPORT

Users with a Maintenance and Support license typically have access to technical support from the software provider. This support can include assistance with troubleshooting, resolving software-related issues, and answering questions or concerns. Technical support may be available through various channels, such as email, phone, or online ticketing systems. With the Maintenance and Support license model, users receive regular software updates, including bug fixes, security patches, and new features or enhancements. These updates ensure that the digital signage software remains reliable, up-to-date, and compatible with evolving technologies. Users also receive priority response from the software provider's support team. They are given higher priority in the queue and receive faster response times compared to users without active support agreements. This prioritized support can be critical in minimizing downtime and resolving issues promptly. It includes additional resources such as training materials, user guides, or documentation to help users maximize the functionality of the digital signage software. These resources can assist with onboarding, learning new features, and ensuring optimal usage of the software. Some Maintenance and Support license models include system health monitoring features. The software may proactively monitor the health and performance of the digital signage network, providing notifications or alerts for potential issues. This monitoring helps identify and address problems before they impact the signage system's functionality.

6.3.1. DIGITAL SIGNAGE SOFTWARE MARKET BY MAINTENANCE AND SUPPORT, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 14. DIGITAL SIGNAGE SOFTWARE MARKET BY MAINTENANCE AND SUPPORT, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	433.9	518.7	619.4	793.0	949.0	1,136.7	1,633.2	1,958.9	2,821.8	3,388.9	4,071.9	4,894.7	20.0%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.3.2. DIGITAL SIGNAGE SOFTWARE MARKET BY MAINTENANCE AND SUPPORT, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 15. DIGITAL SIGNAGE SOFTWARE MARKET BY MAINTENANCE AND SUPPORT, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	188.1	221.9	261.7	331.0	390.6	461.7	645.8	764.2	1,071.3	1,269.1	1,504.0	1,783.0	18.4%
Europe	115.0	139.5	168.6	218.3	265.0	321.5	473.1	574.1	846.1	1,027.3	1,247.8	1,516.2	21.4%
Asia Pacific	130.8	157.3	189.1	243.6	293.3	353.6	514.3	620.5	904.4	1,092.4	1,320.0	1,595.6	20.7%
Total	433.9	518.7	619.4	793.0	949.0	1,136.7	1,633.2	1,958.9	2,821.8	3,388.9	4,071.9	4,894.7	20.0%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.4.   PROFESSIONAL SERVICES

Professional services in digital signage often involve working with experienced professionals who have in-depth knowledge and expertise in deploying and managing digital signage solutions. These experts understand the best practices, industry standards, and potential challenges associated with implementing digital signage networks. They can provide valuable guidance and recommendations based on their experience, ensuring a smooth and successful deployment. These services can offer customized solutions based on specific business requirements. Digital signage professionals can assess the unique needs of an organization and design a solution that aligns with their goals, brand identity, and target audience. This level of customization ensures that the digital signage network is optimized for the intended purpose and delivers the desired impact. Implementing a digital signage network can be a complex and time-consuming process, requiring expertise in areas such as hardware setup, content creation, software configuration, and network integration. By utilizing professional services, individuals or organizations can save time and allocate resources more effectively. Professionals handle the technical aspects, allowing internal teams to focus on their core responsibilities. Professional services often provide project management and deployment support throughout the entire process. This includes activities such as site surveys, installation coordination, content strategy development, and system integration. Having a dedicated project manager ensures that the deployment stays on track, potential issues are addressed promptly, and the project is completed within the specified timeframe. It also assists with scalability and futureproofing of the digital signage network. Professionals can help design a scalable infrastructure that can accommodate future expansion or technological advancements. They can also recommend suitable hardware and software solutions that align with industry trends and standards, ensuring that the digital signage system remains relevant and adaptable over time. Professional services focus on delivering high-quality digital signage solutions. They conduct thorough testing and quality assurance processes to ensure that the system functions as intended and meets performance expectations. Professionals can optimize the system settings, content layout, and display configurations to maximize visual impact and audience engagement.

6.4.1. DIGITAL SIGNAGE SOFTWARE MARKET BY PROFESSIONAL SERVICES, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 16. DIGITAL SIGNAGE SOFTWARE MARKET BY PROFESSIONAL SERVICES, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	156.6	190.9	231.8	302.0	368.5	449.4	669.3	817.2	1,219.6	1,490.8	1,822.8	2,229.5	22.1%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

6.4.2. DIGITAL SIGNAGE SOFTWARE MARKET BY PROFESSIONAL SERVICES, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 17. DIGITAL SIGNAGE SOFTWARE MARKET BY PROFESSIONAL SERVICES, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	62.6	75.9	90.9	117.5	141.6	170.9	249.5	301.7	441.4	534.2	646.9	783.6	20.9%
Europe	43.5	53.3	65.5	86.0	105.8	130.1	196.8	242.1	366.6	451.4	555.6	684.1	23.0%
Asia Pacific	50.5	61.8	75.4	98.6	121.1	148.4	223.0	273.5	411.6	505.2	620.3	761.8	22.7%
Total	156.6	190.9	231.8	302.0	368.5	449.4	669.3	817.2	1,219.6	1,490.8	1,822.8	2,229.5	22.1%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.
# DIGITAL SIGNAGE SOFTWARE MARKET BY PRICING MODEL INSIGHTS & TREND

KEY TRENDS & HIGHLIGHTS

■ The demand of perpetual (on-premises) segment accounted for over USD 1,479.7 million in 2023 and is expected to grow at a rate of 21.2% in the forecast period.

7.1.   PRICING MODEL DYNAMICS & MARKET SHARE, 2023 & 2033

By pricing model, the market is segmented into perpetual (on-premises), and SaaS-based.

FIGURE 14.   DIGITAL SIGNAGE SOFTWARE MARKET: PRICING MODEL DYNAMICS (REVENUE IN USD MILLION)
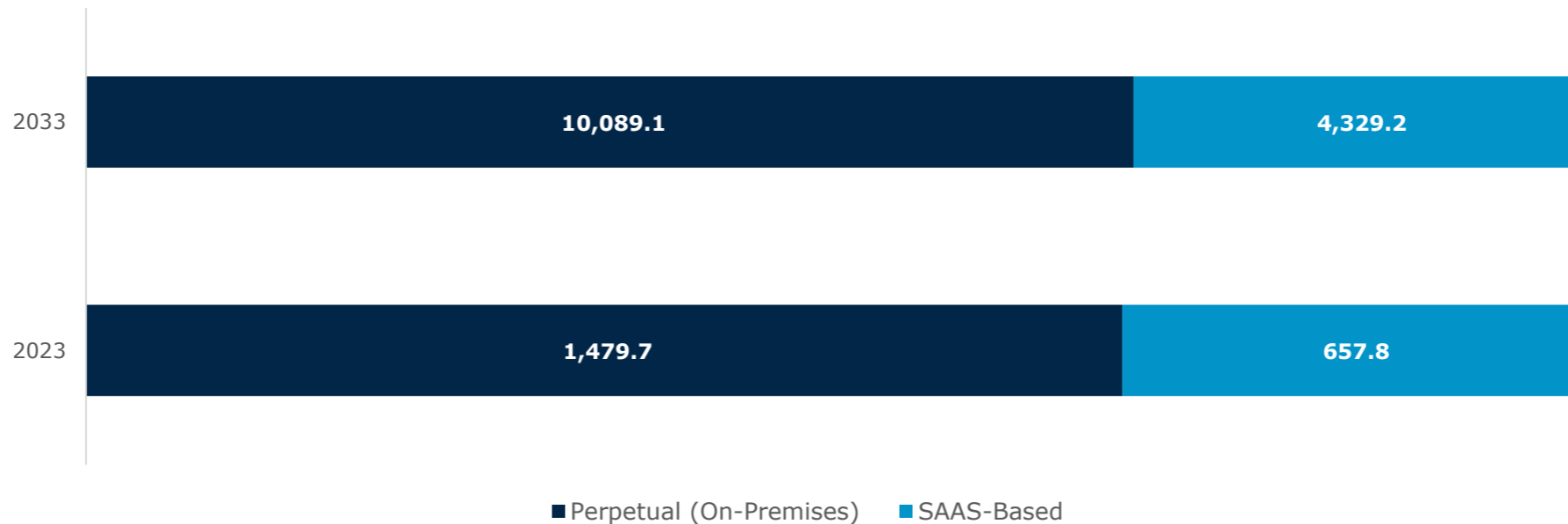
	Perpetual (On-Premises)	SAAS-Based
2033	10,089.1	4,329.2
2023	1,479.7	657.8

■ Perpetual (On-Premises)   ■ SAAS-Based

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.2.   PERPETUAL (ON-PREMISES)

The perpetual pricing model typically involves a one-time upfront payment for the software license. This can be appealing to individuals or organizations who prefer to make a single investment rather than recurring payments. It provides a sense of ownership and eliminates the need for ongoing subscription fees. Over an extended period, the perpetual pricing model can be more cost-effective compared to subscription-based models. While there may be additional costs for maintenance and support, the absence of recurring fees can result in significant savings, especially for long-term users of the software. Users can choose to use the software for as long as they desire without being tied to a subscription contract. Users have the freedom to customize, modify, or extend the software to suit their specific needs and preferences. Some clients prefer the perpetual pricing model as it allows them to integrate the digital signage software with their existing infrastructure without additional subscription dependencies. This is particularly relevant for users who have specific hardware or software requirements that need to be maintained for an extended period. Although, this pricing model is not so commonly offered by companies, a major market player named Mvix provides perpetual license to users which starts at USD 299 and is a one-time payable cost. However, the cost varies as per the user's requirements and is subject to change.

7.2.1.   DIGITAL SIGNAGE SOFTWARE MARKET BY PERPETUAL (ON-PREMISES), ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 18.   DIGITAL SIGNAGE SOFTWARE MARKET BY PERPETUAL (ON-PREMISES), ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	786.6	949.5	1,144.5	1,479.7	1,788.4	2,163.2	3,170.5	3,840.6	5,644.1	6,848.8	8,310.2	10,089.1	21.2%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.2.2. DIGITAL SIGNAGE SOFTWARE MARKET BY PERPETUAL (ON-PREMISES), ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 19. DIGITAL SIGNAGE SOFTWARE MARKET BY PERPETUAL (ON-PREMISES), ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	327.1	390.3	465.0	594.7	709.5	848.2	1,213.8	1,453.2	2,085.8	2,502.5	2,999.9	3,600.4	19.8%
Europe	213.7	260.9	317.8	414.7	507.2	619.5	926.1	1,132.4	1,694.7	2,074.1	2,538.9	3,107.5	22.3%
Asia Pacific	245.8	298.3	361.6	470.3	571.7	695.5	1,030.5	1,255.0	1,863.6	2,272.2	2,771.4	3,381.2	21.8%
Total	786.6	949.5	1,144.5	1,479.7	1,788.4	2,163.2	3,170.5	3,840.6	5,644.1	6,848.8	8,310.2	10,089.1	21.2%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.3. SAAS-BASED

SaaS pricing models offer the flexibility to scale the digital signage solution based on changing needs, allowing users to easily adjust licenses and features as their requirements evolve. This scalability ensures that costs align with actual usage and the growth of the digital signage network. Many SaaS providers offer trial periods, enabling users to evaluate the software's features, user interface, performance, and suitability before committing to a subscription. The pricing in SaaS models is predictable and transparent, with fixed subscription fees known in advance. This allows users to budget and plan expenses without unexpected surprises or cost fluctuations. Subscribers also benefit from regular updates, feature enhancements, and bug fixes included in their subscription. They can stay up to date with the latest software versions and leverage new functionalities without additional charges. A major advantage of the SaaS-based model is that users are relieved of the need to invest in extensive IT infrastructure for hosting and maintaining the digital signage software. The provider hosts and manages the software, alleviating users from server maintenance, software updates, and security management responsibilities. SaaS pricing is typically based on a pay-as-you-go approach. Users only pay for the resources and features they need, allowing for cost optimization and efficient resource allocation. This flexibility enables users to scale up or down their usage and associated costs based on their requirements.

7.3.1. DIGITAL SIGNAGE SOFTWARE MARKET BY SAAS-BASED, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 20. DIGITAL SIGNAGE SOFTWARE MARKET BY SAAS-BASED, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	353.4	425.1	510.7	657.8	792.1	955.1	1,389.0	1,676.7	2,446.4	2,955.5	3,576.4	4,329.2	20.8%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.3.2. DIGITAL SIGNAGE SOFTWARE MARKET BY SAAS-BASED, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 21. DIGITAL SIGNAGE SOFTWARE MARKET BY SAAS-BASED, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	149.2	177.5	210.6	268.2	318.6	379.3	538.2	641.5	912.9	1,088.2	1,301.6	1,555.3	19.3%
Europe	95.2	115.8	140.8	183.1	223.4	272.5	404.4	493.3	734.2	895.9	1,093.8	1,337.1	22.0%
Asia Pacific	109.1	131.7	159.3	206.5	250.1	303.3	446.4	541.9	799.3	971.4	1,181.0	1,436.7	21.4%
Total	353.4	425.1	510.7	657.8	792.1	955.1	1,389.0	1,676.7	2,446.4	2,955.5	3,576.4	4,329.2	20.8%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.3.3.   MONTHLY SUBSCRIPTION

Monthly subscriptions offer scalability and flexibility to match the changing needs of the business. As the digital signage network grows or requirements evolve, users can easily add or remove licenses, upgrade or downgrade plans, or access additional features without being tied to long-term commitments. This agility enables businesses to align costs with the actual usage and scale their digital signage solution as required. Monthly subscriptions often provide an opportunity for users to test the software before making a long-term commitment. This trial period allows businesses to evaluate the software's functionality, user interface, performance, and suitability for their specific needs. It reduces the risk of investing in a solution that may not meet expectations and provides the flexibility to explore other options if necessary. Subscribing to a monthly plan usually includes access to software updates, new features, and ongoing technical support. Users can benefit from regular updates that enhance the functionality and security of the digital signage software. Additionally, they can rely on the support services provided by the software vendor to troubleshoot issues, receive guidance, and ensure smooth operation of their digital signage network. Monthly subscriptions have a lower entry barrier compared to perpetual licenses or upfront payments. This makes digital signage software more accessible to a wider range of businesses, including startups, small and medium-sized enterprises (SMEs), and organizations with limited resources. It allows businesses to adopt digital signage without a significant initial investment, reducing financial risk and enabling faster implementation. With a monthly subscription, users typically delegate the maintenance and technical aspects to the software provider. This relieves businesses of the burden of managing servers, performing software updates, and ensuring security measures. The software vendor takes care of infrastructure maintenance, allowing businesses to focus on content creation and other core operations.

7.3.3.1. DIGITAL SIGNAGE SOFTWARE MARKET BY MONTHLY SUBSCRIPTION, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 22. DIGITAL SIGNAGE SOFTWARE MARKET BY MONTHLY SUBSCRIPTION, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	255.9	306.7	367.1	471.2	565.4	679.2	980.8	1,179.7	1,709.2	2,057.4	2,480.9	2,992.4	20.3%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.3.3.2. DIGITAL SIGNAGE SOFTWARE MARKET BY MONTHLY SUBSCRIPTION, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 23. DIGITAL SIGNAGE SOFTWARE MARKET BY MONTHLY SUBSCRIPTION, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	109.7	130.0	153.6	194.8	230.5	273.2	384.4	456.3	643.9	764.3	910.3	1,083.0	18.8%
Europe	68.3	82.9	100.5	130.3	158.5	192.8	284.7	346.3	512.5	623.6	759.3	925.5	21.7%
Asia Pacific	77.9	93.8	113.1	146.1	176.4	213.2	311.7	377.1	552.7	669.5	811.4	983.9	21.0%
Total	255.9	306.7	367.1	471.2	565.4	679.2	980.8	1,179.7	1,709.2	2,057.4	2,480.9	2,992.4	20.3%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.3.4. ANNUAL SUBSCRIPTION

Annual subscriptions often offer cost savings compared to monthly subscriptions. Software providers often provide discounted pricing for customers who commit to an annual subscription upfront. This can result in lower average monthly costs compared to paying on a month-to-month basis. Some businesses prefer the stability and commitment of an annual subscription. By choosing an annual plan, they are making a longer-term commitment to the software provider, which can result in a stronger relationship and potentially better service and support. By opting for an annual subscription, businesses can have a more predictable budget for their digital signage software expenses. They know the total cost for the year in advance and can plan their finances accordingly. This can be particularly beneficial for businesses that prefer to allocate their budget on an annual basis rather than on a monthly basis. Annual subscriptions reduce administrative tasks associated with monthly billing and renewals. Businesses can streamline their billing processes and avoid the need for regular invoicing or payment processing. This can save time and resources, particularly for businesses managing multiple subscriptions or a large digital signage network. An annual subscription allows businesses to focus more on their core operations and content creation rather than dealing with regular subscription renewals or negotiations. With a longer subscription term, businesses can dedicate their time and resources to maximizing the value and effectiveness of their digital signage campaigns. Opting for this subscription ensures uninterrupted access to the digital signage software throughout the year. There's no need to worry about monthly renewal or potential service interruptions due to missed payments. This is especially important for businesses that rely heavily on their digital signage solution and need continuous operation without any disruptions. An annual subscription reduces the need for ongoing vendor evaluations and negotiations. Once a business has selected a software provider and committed to an annual subscription, they can focus on maximizing the value of the software rather than diverting resources to assess alternatives or manage multiple vendor relationships. This streamlines vendor management and allows businesses to concentrate on other critical aspects of their operations.

7.3.4.1. DIGITAL SIGNAGE SOFTWARE MARKET BY ANNUAL SUBSCRIPTION, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 24. DIGITAL SIGNAGE SOFTWARE MARKET BY ANNUAL SUBSCRIPTION, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	97.5	118.4	143.6	186.6	226.8	275.9	408.2	497.0	737.3	898.1	1,095.5	1,336.8	21.8%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

7.3.4.2. DIGITAL SIGNAGE SOFTWARE MARKET BY ANNUAL SUBSCRIPTION, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 25. DIGITAL SIGNAGE SOFTWARE MARKET BY ANNUAL SUBSCRIPTION, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	39.5	47.6	57.0	73.4	88.2	106.1	153.7	185.2	269.0	323.9	391.3	472.3	20.5%
Europe	26.9	33.0	40.3	52.8	64.9	79.7	119.8	147.1	221.7	272.3	334.5	411.6	22.8%
Asia Pacific	31.2	37.9	46.2	60.4	73.7	90.1	134.7	164.7	246.6	301.9	369.6	452.9	22.3%
Total	97.5	118.4	143.6	186.6	226.8	275.9	408.2	497.0	737.3	898.1	1,095.5	1,336.8	21.8%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

8.
## DIGITAL SIGNAGE SOFTWARE MARKET BY ORGANIZATION SIZE INSIGHTS & TREND

KEY TRENDS & HIGHLIGHTS

- The demand of small and medium sized enterprises segment accounted for over USD 792.1 million in 2023 and is expected to grow at a rate of 21.7% in the forecast period.

8.1.   ORGANIZATION SIZE DYNAMICS & MARKET SHARE, 2023 & 2033

By organization size, the market is segmented into small and medium sized enterprises (SMEs), and large enterprises.

FIGURE 15.   DIGITAL SIGNAGE SOFTWARE MARKET: ORGANIZATION SIZE DYNAMICS (REVENUE IN USD MILLION)
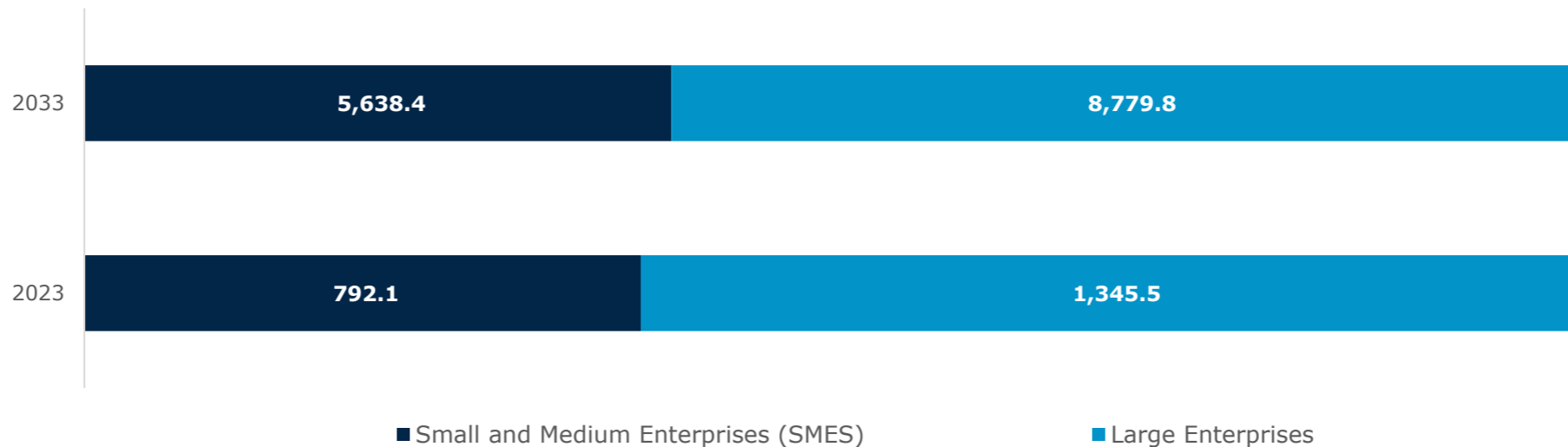
| | 2033 | 5,638.4 | 8,779.8 |
| | 2023 | 792.1 | 1,345.5 |

■ Small and Medium Enterprises (SMES)   ■ Large Enterprises

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

8.2. SMALL AND MEDIUM-SIZED ENTERPRISES (SMES)

Digital signage is a cost-effective advertising solution for SMEs. Traditional advertising methods like print media or billboards can be expensive and have limited reach. With digital signage, SMEs can create and display engaging content in real-time, eliminating printing costs and the need for physical materials. It allows for quick and easy updates, enabling SMEs to adapt their messaging based on current promotions or market trends. Digital signage software enables SMEs to make real-time updates and changes to their content. They can easily modify messages, promotions, or announcements to respond to changing market conditions or customer preferences. This flexibility allows SMEs to stay agile, test different approaches, and optimize their messaging for better results. Digital signage provides SMEs with a powerful tool to enhance their branding and marketing efforts. They can display dynamic and eye-catching content, including promotional messages, product information, special offers, and engaging visuals. Digital signage attracts attention, increases brand visibility, and helps SMEs stand out in competitive markets. Digital signage provides SMEs with a powerful tool to enhance their branding and marketing efforts. They can display dynamic and eye-catching content, including promotional messages, product information, special offers, and engaging visuals. Digital signage attracts attention, increases brand visibility, and helps SMEs stand out in competitive markets. Digital signage can enhance the overall customer experience for SMEs. It can provide helpful information, such as wayfinding or event schedules, reducing customer confusion or frustration. SMEs can also use digital signage to entertain customers with engaging content while they wait, creating a positive and memorable experience. Implementing digital signage gives SMEs a competitive edge in their industry. It showcases a modern and innovative approach to customer communication, setting them apart from competitors who rely solely on traditional marketing methods. Digital signage can attract attention, create a memorable impression, and position SMEs as tech-savvy and customer-centric businesses.

8.2.1. DIGITAL SIGNAGE SOFTWARE MARKET BY SMALL AND MEDIUM SIZED ENTERPRISES, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

TABLE 26. DIGITAL SIGNAGE SOFTWARE MARKET BY SMALL AND MEDIUM SIZED ENTERPRISES, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	415.3	503.4	609.9	792.1	961.7	1,168.5	1,727.3	2,101.4	3,114.5	3,794.1	4,623.7	5,638.4	21.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

8.2.2. DIGITAL SIGNAGE SOFTWARE MARKET BY SMALL AND MEDIUM SIZED ENTERPRISES, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 27. DIGITAL SIGNAGE SOFTWARE MARKET BY SMALL AND MEDIUM SIZED ENTERPRISES, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	169.2	203.1	243.3	312.8	375.2	450.9	652.1	784.7	1,138.1	1,371.5	1,653.6	1,994.7	20.4%
Europe	114.0	139.5	170.8	223.6	274.4	336.4	506.1	620.9	935.5	1,148.7	1,410.8	1,734.3	22.7%
Asia Pacific	132.1	160.8	195.8	255.7	312.1	381.2	569.1	695.8	1,040.9	1,273.8	1,559.3	1,909.5	22.3%
Total	415.3	503.4	609.9	792.1	961.7	1,168.5	1,727.3	2,101.4	3,114.5	3,794.1	4,623.7	5,638.4	21.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

8.3. LARGE ENTERPRISES

Large enterprises often have numerous employees spread across multiple locations. Digital signage provides an effective platform for internal communication, enabling the dissemination of important announcements, corporate news, employee recognition, safety reminders, training materials, and other relevant information. It helps keep employees informed, engaged, and aligned with the company's goals and values. Large enterprises often have extensive facilities, such as office buildings, campuses, or retail spaces. Digital signage can serve as interactive wayfinding tools, guiding visitors and employees through complex environments. It helps users easily navigate the premises, locate specific areas or departments, find meeting rooms, and access important information. Maintaining brand consistency is crucial for large enterprises with multiple branches or franchises. Digital signage software allows for consistent branding across all locations by providing centralized control over content and design. It ensures that branding guidelines are followed, and messaging remains uniform, reinforcing a strong and cohesive brand identity. Large enterprises frequently engage in marketing and advertising activities. Digital signage provides a dynamic and visually appealing medium to promote products, services, and special offers. It allows enterprises to showcase targeted advertisements, cross-promote related products, or promote campaigns across various locations, maximizing their marketing efforts and increasing sales potential. Large enterprises typically have a significant number of digital signage displays across various locations. Digital signage software allows for centralized management, making it easier to control and update content, schedules, and settings. It provides scalability, enabling enterprises to expand their digital signage network effortlessly as they grow or open new locations.

8.3.1. DIGITAL SIGNAGE SOFTWARE MARKET BY LARGE ENTERPRISES, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

**TABLE 28.** DIGITAL SIGNAGE SOFTWARE MARKET BY LARGE ENTERPRISES, ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	724.8	871.2	1,045.2	1,345.5	1,618.9	1,949.7	2,832.2	3,415.9	4,976.1	6,010.2	7,262.9	8,779.8	20.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

8.3.2. DIGITAL SIGNAGE SOFTWARE MARKET BY LARGE ENTERPRISES, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

TABLE 29. DIGITAL SIGNAGE SOFTWARE MARKET BY LARGE ENTERPRISES, ESTIMATES AND FORECASTS, BY REGION, 2020-2033, (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
North America	307.1	364.7	432.4	550.1	653.0	776.6	1,099.9	1,310.0	1,860.7	2,219.1	2,647.9	3,161.0	19.2%
Europe	194.8	237.2	287.8	374.2	456.2	555.5	824.5	1,004.8	1,493.4	1,821.3	2,222.0	2,710.3	21.9%
Asia Pacific	222.9	269.2	325.1	421.1	509.8	617.6	907.8	1,101.1	1,622.0	1,969.8	2,393.1	2,908.5	21.3%
Total	724.8	871.2	1,045.2	1,345.5	1,618.9	1,949.7	2,832.2	3,415.9	4,976.1	6,010.2	7,262.9	8,779.8	20.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews and Emergen Research Analysis

9.

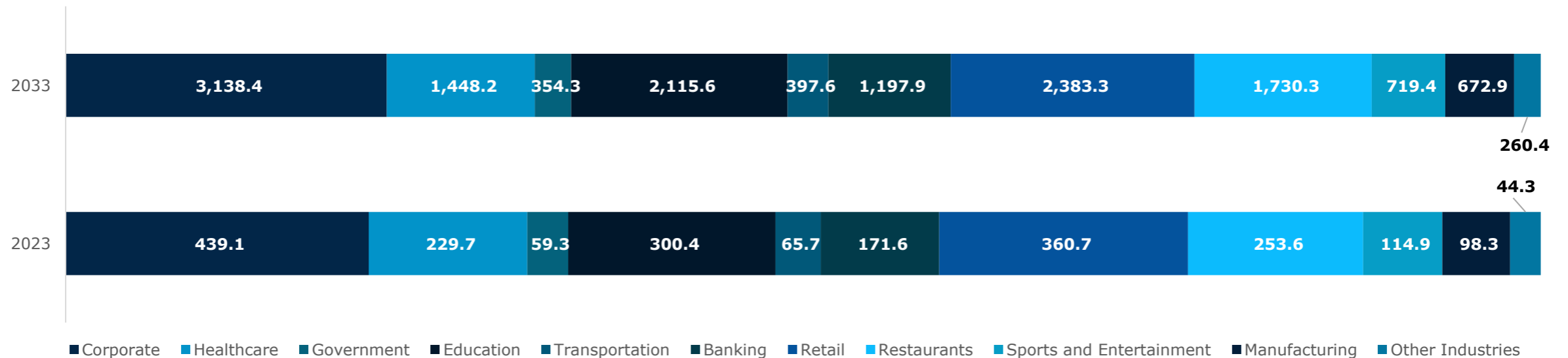# DIGITAL SIGNAGE SOFTWARE MARKET BY INDUSTRY TYPE INSIGHTS & TREND
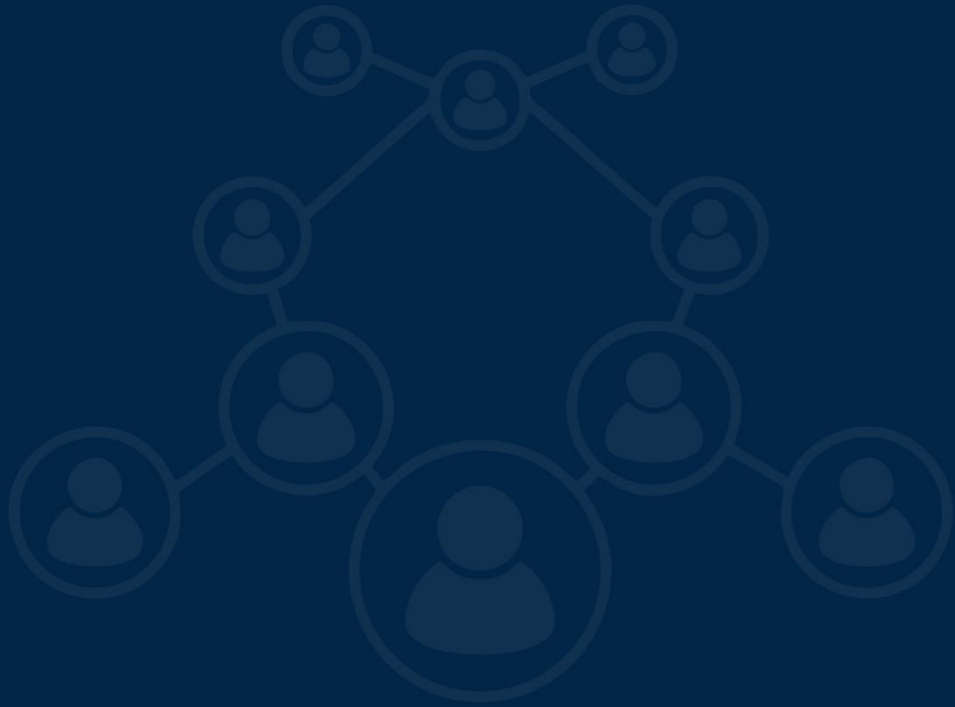
KEY TRENDS & HIGHLIGHTS

■ The demand of healthcare segment accounted for over USD 229.7 million in 2023 and is expected to grow at a rate of 20.2% in the forecast period.

9.1.   INDUSTRY TYPE DYNAMICS & MARKET SHARE, 2023 & 2033

By industry type, the market is segmented into corporate, healthcare, government, education, transportation, banking, retail, restaurants, sports and entertainment, manufacturing, and other industries.

FIGURE 16.   DIGITAL SIGNAGE SOFTWARE MARKET: INDUSTRY TYPE DYNAMICS (REVENUE IN USD MILLION)

Legend: ■ Corporate ■ Healthcare ■ Government ■ Education ■ Transportation ■ Banking ■ Retail ■ Restaurants ■ Sports and Entertainment ■ Manufacturing ■ Other Industries

2033: 3,138.4 | 1,448.2 | 354.3 | 2,115.6 | 397.6 | 1,197.9 | 2,383.3 | 1,730.3 | 719.4 | 672.9 | 260.4

2023: 439.1 | 229.7 | 59.3 | 300.4 | 65.7 | 171.6 | 360.7 | 253.6 | 114.9 | 98.3 | 44.3

10.
DIGITAL SIGNAGE SOFTWARE MARKET BY REGIONAL INSIGHTS & TRENDS

KEY REGIONAL TRENDS & HIGHLIGHTS

■ Europe is expected to account for a share of 18.0% in the Digital Signage Software Market in 2033.

10.1. REGIONAL DYNAMICS & MARKET SHARE, 2023 & 2033
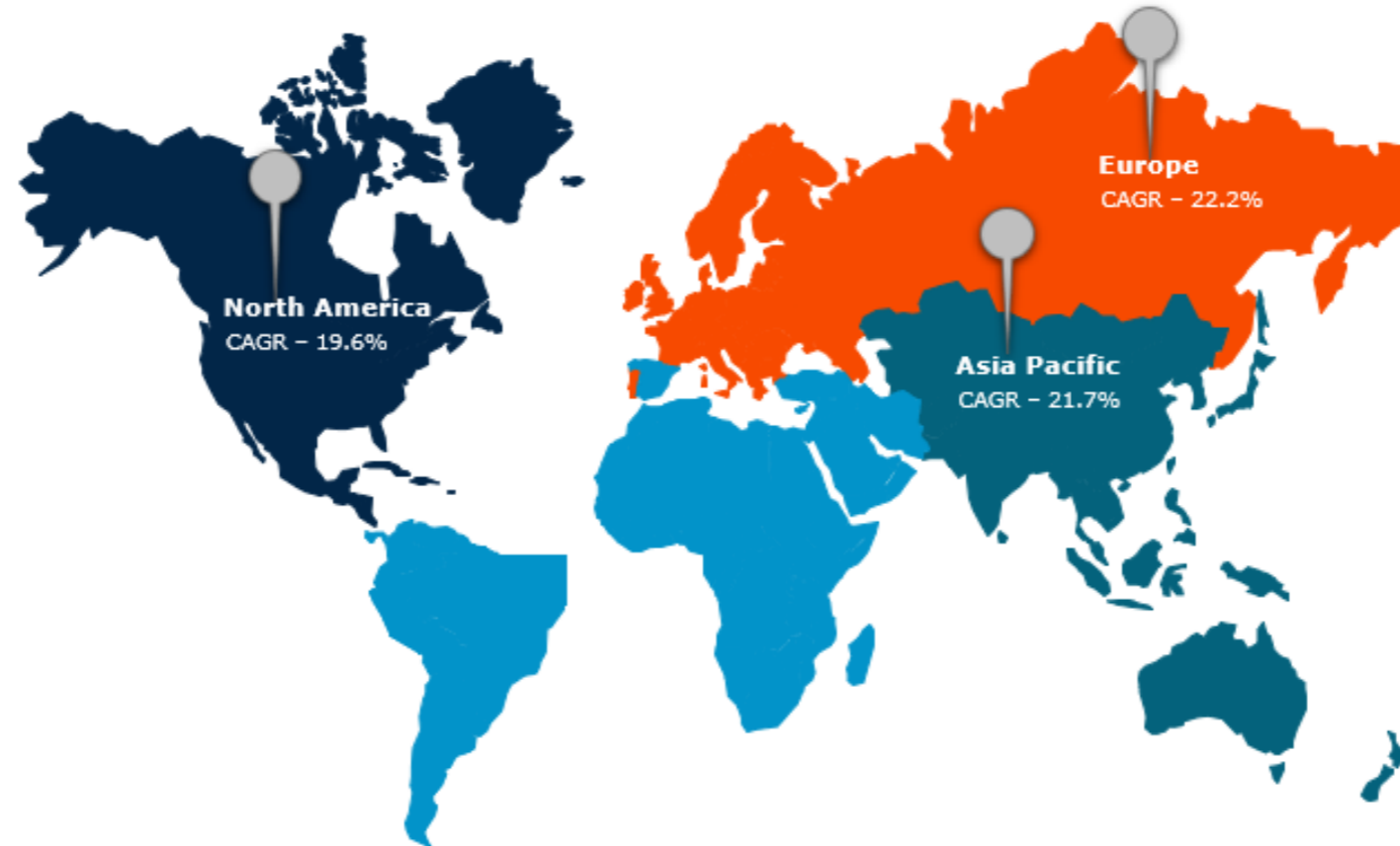
10.2. NORTH AMERICA

Digital Signage Software Market Regional Snapshot 2023
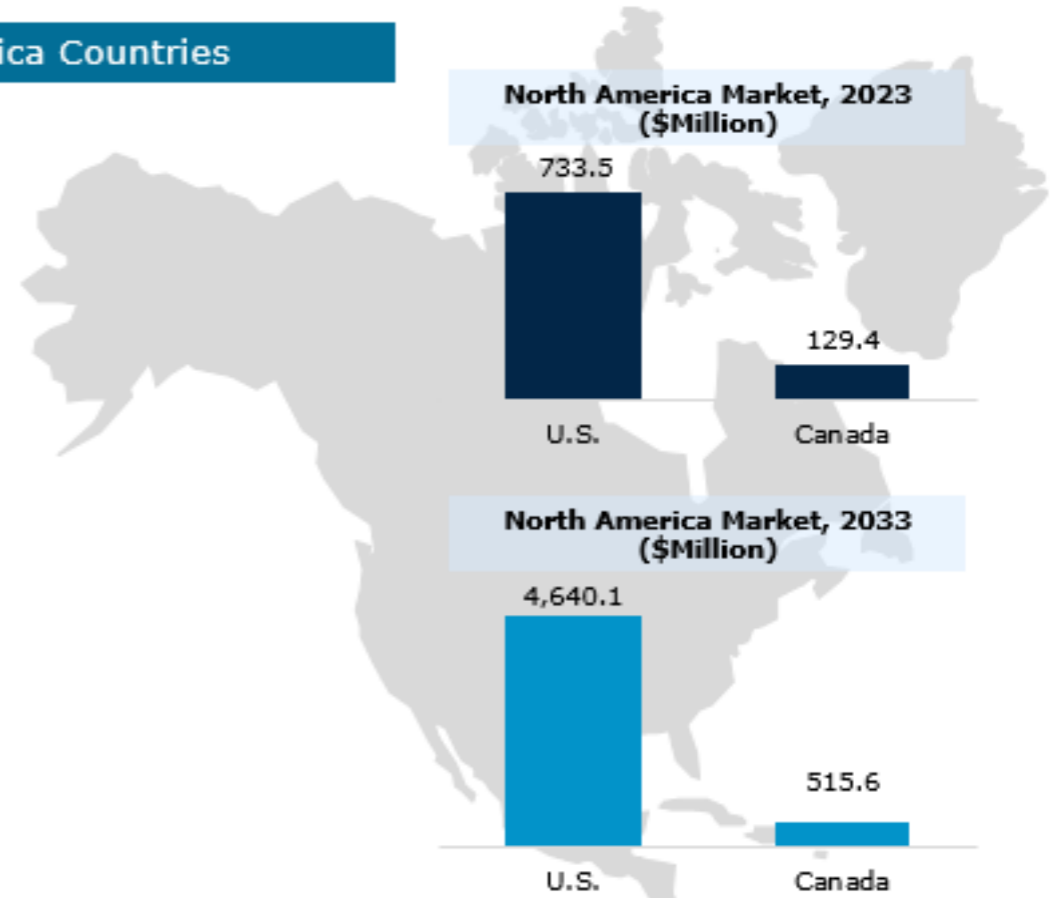**North America**

EMERGEN RESEARCH

Digital Signage Software Market Opportunities in North America Countries

Advancements in display technologies unfolds new growth opportunities for the **Digital Signage Software market** in North America

Rapid adoption of advanced technologies in the developing North America countries is stimulating the market growth

U.S. county holds **85.0%** share of the North America Digital Signage Software market

U.S. is the **fastest growing county** in the North America Digital Signage Software market

North America Market, 2023 ($Million)

733.5 — U.S.
129.4 — Canada

North America Market, 2033 ($Million)

4,640.1 — U.S.
515.6 — Canada

North America accounted for the largest revenue share primarily owing to increasing usage of signages in retail outlets, airports, bus stations, and railway stations is a major factor boosting revenue growth in this region. For instance, KFC is collaborating with ZetaDisplay and Boostr Agency to enhance its digital signage offerings. As part of this expansion, every KFC restaurant will be equipped with six screens serving as digital menu boards. Additionally, the company is currently conducting trials using digital screens placed in the outward-facing windows. Also, there is a rising rate of using indoor and outdoor digital signage in commercial sector for brand promotion and marketing, growing number of institutes are using digital signage for educational purposes which has also significantly contributed to the growth of the market in this. Companies which are aiming to provide their audience relevant material, digital signages makes it possible to tailor advertising and customize communications. Furthermore, rising technological innovations and development by various manufacturers in this region is expected to boost the revenue growth of the market. For instance, 22Miles, Inc. has unveiled an exciting new product, Carry2Mobile. It utilizes HTML5 technology to seamlessly transition the user experience from a digital sign to a mobile device's web browser. Carry2Mobile technology enables anyone to experience content on a mobile phone with no app download necessary. This benefits digital signage owners by empowering end users to consume content on the go. Through native HTML5 technology, users can seamlessly transition experiences from a digital sign onto their mobile device with a simple QR code scan. Companies are also entering into various strategic alliances in the form of partnership agreements, mergers and acquisitions which is also significantly supporting revenue growth in this region. For instance, according to a press release, Gameway, and Red Dot Digital Media have partnered to create digital signage for its network of airport video gaming lounges. As airport retail sales continue to struggle in the post-pandemic lockdown environment, Gameway says it wants to take advantage of and reuse vacant retail spaces. William P. Hobby Airport in Houston, Texas; Charlotte Douglas International Airport Terminal E in Charlotte, North Carolina; Terminals 3 and 6 of Los Angeles International Airport in Los Angeles, California; and Terminals 3 and 6 of Dallas Fort Worth International Airport in Dallas, Texas are among the airports that are taking part. Red Dot installed the hardware and set up the software and content for the lounges.

10.3. EUROPE

Digital Signage Software Market Regional Snapshot 2023
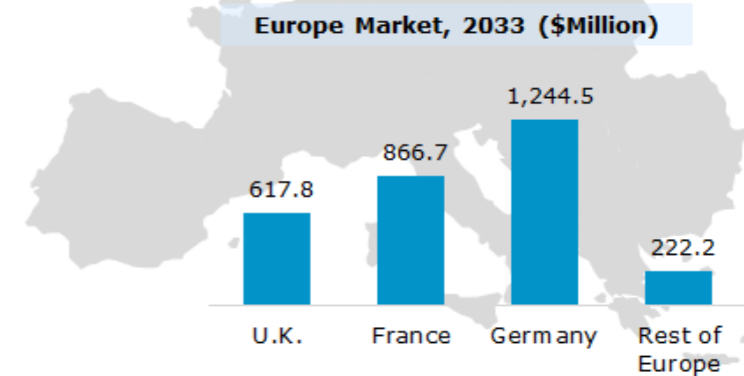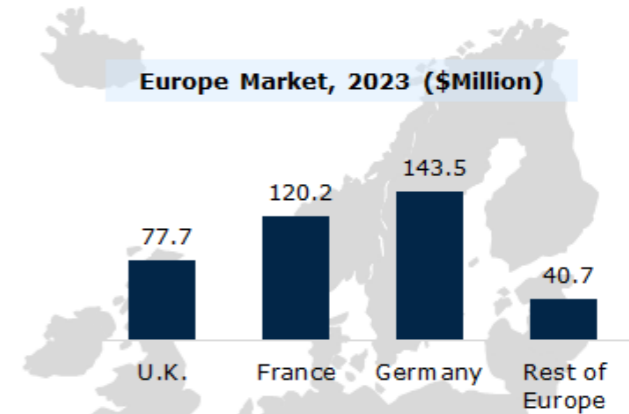### Europe

EMERGEN RESEARCH

Digital Signage Software Market Opportunities in Developing Europe Countries

Rising adoption of cloud-based digital signage software unfolds new growth opportunities for the **Digital Signage Software market** in Europe

Increasing infrastructure expenditure in the developing Europe countries is stimulating the market growth

Germany county holds **24.0%** share of the Europe Digital Signage Software market

Germany is the **fastest growing county** in the Europe Digital Signage Software market

Europe Market, 2023 ($Million)

U.K.	France	Germany	Rest of Europe
77.7	120.2	143.5	40.7

Europe Market, 2033 ($Million)

U.K.	France	Germany	Rest of Europe
617.8	866.7	1,244.5	222.2

Increasing demand from healthcare facilities, transport, and entertainment sectors is driving revenue growth in this region. The digital signage industry is constantly evolving, with new technologies and features being introduced regularly. European businesses seek digital signage software that keeps up with these advancements, such as support for augmented reality (AR), artificial intelligence (AI), and Internet of Things (IoT) integration. The demand for software solutions that can leverage these emerging technologies is eventually driving the growth of the digital signage market. Retail establishments utilize digital signage displays to effectively convey tailored messages through advertising, information, and other relevant content. This enables retailers to optimize the impact of their messaging, leading to efficient and profitable communication with their target audience. An example of this implementation can be seen in the recent consumer communications update by Carrefour Group, a prominent European retail company. They have installed 150 screens across 25 stores in Belgium, incorporating an integrated audio system, a customized content management system, and integrated queuing. In response to the dominance of the retail industry in the region, several key suppliers are developing retail-specific solutions. NEC Display Solutions Europe, for instance, has recently unveiled a new line of large-format UHD displays featuring wide screen widths and excellent resolution levels, enabling both close-up and distant viewing experiences.

10.3.1.   EUROPE DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECAST, 2020-2033 (USD MILLION)

TABLE 71.   EUROPE DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	308.8	376.7	458.6	597.8	730.5	892.0	1,330.6	1,625.7	2,428.9	2,970.0	3,632.7	4,444.6	22.2%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior,, Primary Research, Company Website, Annual Report, Primary Interviews, and Emergen Research Analysis

10.3.2. EUROPE DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECAST, BY COUNTRY, 2020-2033 (USD MILLION)

TABLE 72. EUROPE DIGITAL SIGNAGE SOFTWARE MARKET REVENUE ESTIMATES AND FORECAST, BY COUNTRY, 2020-2033 (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Germany	70.4	87.4	108.2	143.5	178.3	221.2	340.6	422.7	650.9	809.3	1,002.6	1,244.5	24.1%
U.K.	39.2	48.1	59.0	77.7	95.3	117.2	177.4	218.3	330.7	408.4	501.5	617.8	23.1%
Spain	34.6	42.1	51.0	66.4	80.4	97.6	144.1	175.2	259.1	313.3	383.5	466.7	21.6%
France	62.4	76.0	92.2	120.2	146.1	177.9	263.9	321.5	477.7	583.6	710.4	866.7	21.9%
Italy	51.9	63.0	76.4	99.2	120.5	146.5	216.4	263.2	389.4	478.2	576.8	702.2	21.6%
Benelux	26.9	32.5	39.1	50.2	60.6	73.0	106.0	127.7	185.4	219.8	269.2	324.5	20.5%
Rest of Europe	23.5	27.6	32.7	40.7	49.3	58.5	82.1	97.1	135.6	157.4	188.7	222.2	18.2%
Total	**308.8**	**376.7**	**458.6**	**597.8**	**730.5**	**892.0**	**1,330.6**	**1,625.7**	**2,428.9**	**2,970.0**	**3,632.7**	**4,444.6**	**22.2%**

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, the Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior,, Primary Research, Company Website, Annual Report, Primary Interviews, and Emergen Research Analysis

10.4. ASIA-PACIFIC

Digital Signage Software Market Regional Snapshot 2023
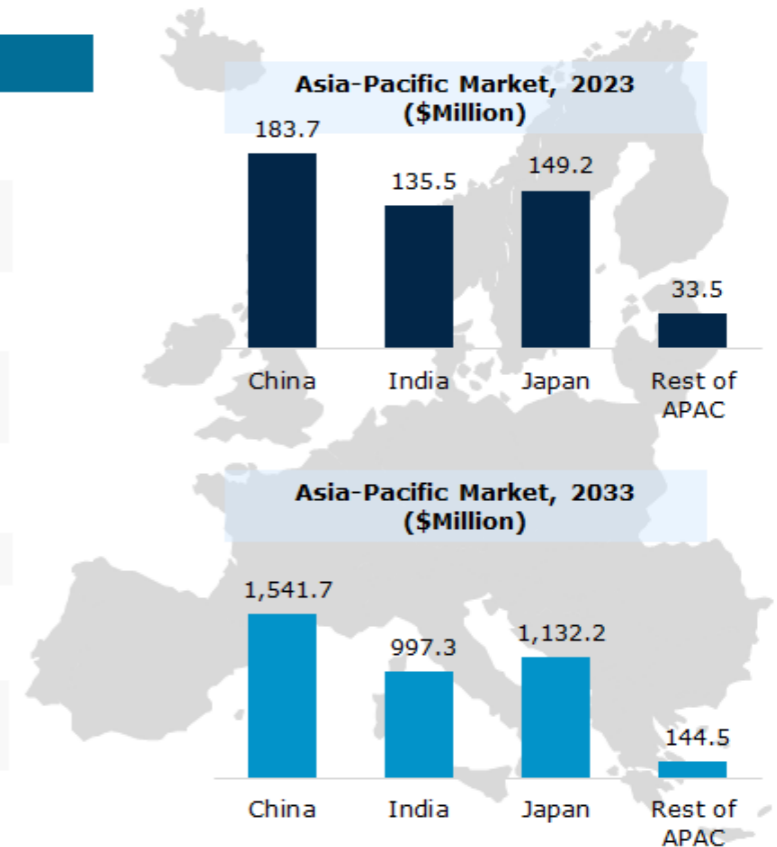**Asia-Pacific**

EMERGEN RESEARCH

Digital Signage Software Market Opportunities in Asia-Pacific Countries

Rising adoption of cloud-based digital signage software unfolds new growth opportunities for the **Digital Signage Software market** in Asia-Pacific

Increasing infrastructure expenditure in the developing Europe countries is stimulating the market growth

China county holds **27.1%** share of the Asia-Pacific Digital Signage Software market

China is the **fastest growing county** in the Asia Pacific Digital Signage Software market

Asia-Pacific Market, 2023 ($Million)

China	India	Japan	Rest of APAC
183.7	135.5	149.2	33.5

Asia-Pacific Market, 2033 ($Million)

China	India	Japan	Rest of APAC
1,541.7	997.3	1,132.2	144.5

The countries in this region are witnessing rapid urbanization, infrastructure development, and a growing middle class with increased purchasing power. As a result, businesses in the Asia Pacific region are seeking innovative ways to enhance customer engagement, deliver personalized experiences, and differentiate themselves in a competitive market. Also, the widespread adoption of digital technology in the Asia Pacific region has created a tech-savvy consumer base that embraces digital interactions. Consumers are increasingly drawn to visually appealing and interactive content, which can be effectively delivered through digital signage. This demand for immersive experiences has fueled the need for advanced digital signage software solutions that enable dynamic content creation, real-time updates, and interactive features. Additionally, the Asia Pacific region has seen significant investments in smart city initiatives, transportation infrastructure, and public spaces. Rapid advancements in cloud computing and mobile technologies have made digital signage software more accessible and scalable. Governments and organizations are leveraging digital signage solutions to create smarter, more connected environments that enhance communication and efficiency. Businesses in the Asia Pacific region are embracing cloud-based digital signage solutions that offer remote management capabilities, multi-site deployment, and data analytics. These features enable businesses to streamline their operations, optimize content delivery, and measure the effectiveness of their digital signage campaigns.

10.4.1. ASIA-PACIFIC DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECAST, 2020-2033 (USD MILLION)

TABLE 120. ASIA-PACIFIC DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECASTS, 2020-2033, (USD MILLION)

Market Size	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
Revenue (USD MILLION)	354.9	430.0	520.9	676.8	821.9	998.8	1,476.9	1,796.9	2,662.9	3,243.6	3,952.4	4,817.9	21.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, The Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews, and Emergen Research Analysis

10.4.2. ASIA-PACIFIC DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECAST, BY COUNTRY, 2020-2033 (USD MILLION)

TABLE 121. ASIA-PACIFIC DIGITAL SIGNAGE SOFTWARE MARKET REVENUE ESTIMATES AND FORECAST, BY COUNTRY, 2020-2033 (USD MILLION)

Region	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	2033	CAGR (2024-33)
China	91.1	112.5	138.8	183.7	227.0	280.8	429.5	531.3	813.3	1,006.4	1,245.5	1,541.7	23.7%
India	70.3	85.5	103.9	135.5	165.1	201.3	299.7	365.8	545.8	667.0	815.5	997.3	22.1%
South Korea	47.1	56.6	68.1	87.8	105.8	127.6	185.8	224.4	327.3	395.5	478.1	578.2	20.8%
Japan	76.7	93.5	114.1	149.2	182.3	223.1	334.1	409.2	614.1	752.8	923.0	1,132.2	22.5%
Oceania	26.9	31.7	37.3	47.0	55.3	65.0	89.8	105.5	144.9	169.6	198.2	231.3	17.2%
ASEAN Countries	23.2	27.2	32.0	40.2	47.3	55.5	76.3	89.3	122.1	142.4	165.8	192.7	16.9%
Rest of APAC	19.6	22.9	26.8	33.5	39.0	45.5	61.5	71.4	95.4	109.9	126.3	144.5	15.7%
Total	354.9	430.0	520.9	676.8	821.9	998.8	1,476.9	1,796.9	2,662.9	3,243.6	3,952.4	4,817.9	21.7%

Source: The Society of Information Display, International Telecommunication Union, United Nations, European Commission, US International Trade Commission, Government of Canada, Government of Australia-Department of Climate Change, Energy, The Environment and Water, Department of information Technology (Taiwan), Government of India, Ministry of Economy, Trade and Industry (Japan), U.S. Department of the Interior, Primary Research, Company Website, Annual Report, Primary Interviews, and Emergen Research Analysis

11. COMPETITIVE LANDSCAPE

11.1. DIGITAL SIGNAGE SOFTWARE MARKET: COMPANY MARKET SHARE ANALYSIS: 2023

The Digital Signage Software Market is fragmented in nature, with several numbers of established as well as new market players. The top five companies operating in NA, EU, APAC market together hold 12.79% of the market, as of 2022. Scala dominated the market with 3.56% of market share, followed by, Appspace Inc., Poppulo, Hughes Network, and Mvix Inc., with 3.04%, 2.46%, 1.95% and 1.79% market shares respectively.

TABLE 169. DIGITAL SIGNAGE SOFTWARE MARKET: MARKET SHARE OF TOP COMPANIES: 2023

Company	Market Share
Scala	3.56%
Appspace	3.04%
Poppulo	2.46%
Hughes Network	1.95%
Mvix	1.79%
Mood Media	1.19%
Navori Labs	0.94%
22Miles	0.91%
Zeta Display	0.89%
OneLan	0.88%
Tripleplay (Uniguest)	0.72%
BrightSign, LLC	0.71%
Visix	0.65%
Signagelive	0.61%
Carousel	0.55%

DISE	0.53%
NoviSign	0.45%
Korbyt	0.43%
Intuiface	0.42%
Rise Vision Inc.	0.41%
Others	76.93%

Source: Company Products and Strategy Analysis, Primary Research, Executive Interview, and Emergen Research Analysis

FIGURE 17. DIGITAL SIGNAGE SOFTWARE MARKET: MARKET SHARE ANALYSIS: 2023
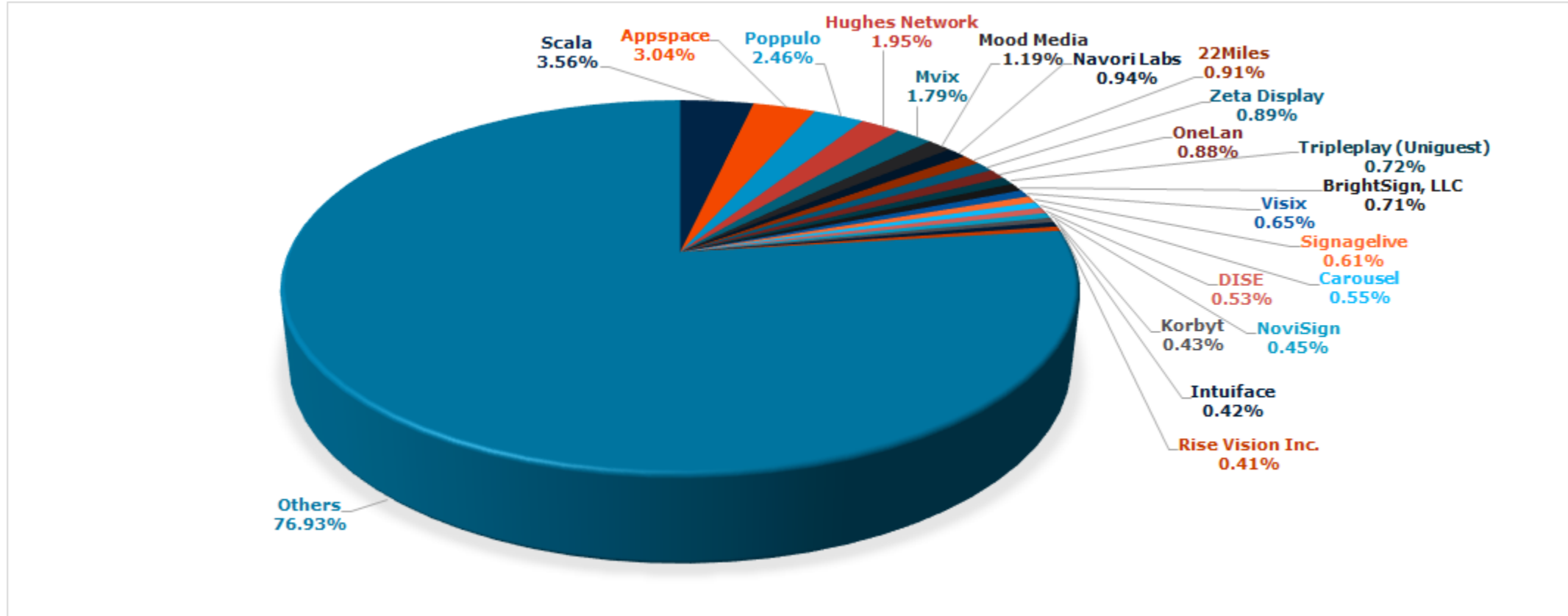
Source: Company Products and Strategy Analysis, Primary Research, Executive Interview, and Emergen Research Analysis

11.3. COMPLETENESS OF PRODUCT OFFERINGS OF KEY DIGITAL SIGNAGE SOFTWARE PLAYER

FIGURE 18. DIGITAL SIGNAGE SOFTWARE MARKET COMPLETENESS OF PRODUCT OFFERINGS OF KEY MARKET PLAYER, 2020-2023
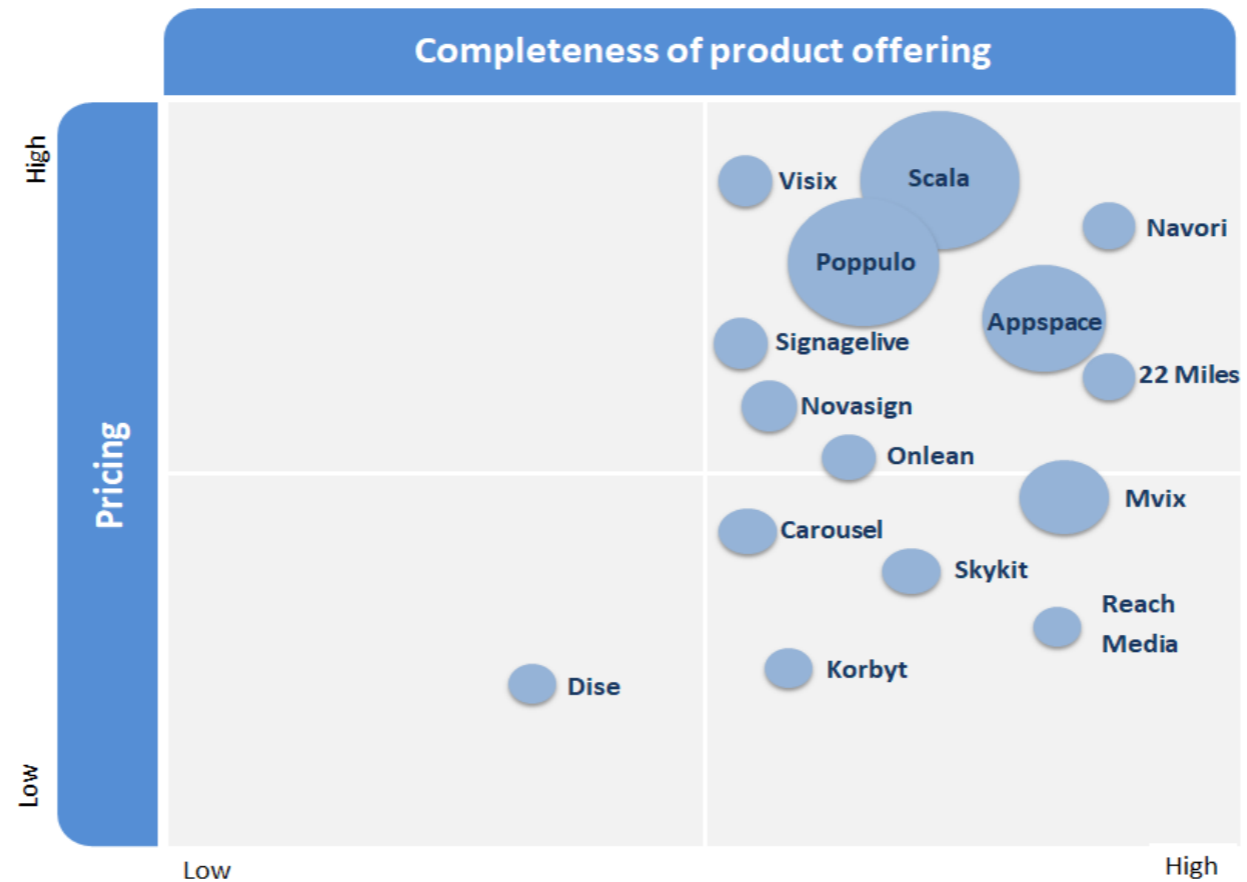
Source: Company Products and Strategy Analysis, Primary Research, Executive Interview, and Emergen Research Analysis

12. COMPANY PROFILES (SOFTWARE PROVIDERS)

12.1. SCALA (STRATACACHE)

Type: Private

Industry: Advertising Services

Founded: 1987

Headquarters: Malvern, Pennsylvania, United States

Website: www.scala.com

12.1.1. COMPANY SUMMARY

Scala is a digital signage software and hardware provider located outside Philadelphia, Pennsylvania USA, and founded in the year 1987. Operating globally, Scala heavily focuses on the retail and restaurant sector, but also has customers in other verticals such as education, corporate communications, transportation, and government. In August 2016, Scala was acquired by STRATACACHE, its primary competitor in the digital signage space. Shortly after this acquisition, Scala launched a series of Windows and Linux media players to complement its CMS. Scala player software is now only available on Scala branded media players.

Their products and services, which include intuitive software for content creation and distribution, professional-grade hardware, and custom solutions tailored to specific business needs, enable organizations worldwide to deliver dynamic and impactful visual experiences. Known for its commitment to innovation, quality, and customer service, Scala helps businesses harness the power of digital signage to achieve their communication and marketing objectives, making it a trusted partner in the digital signage industry.

12.2. APPSPACE INC.

Type: Private

Industry: Software Development

Founded: 2002

Headquarters: Dallas, Texas, United States

Website: www.appspace.com

12.2.1.COMPANY SUMMARY

Appspace's is a communication and space tool management company, enabling organizations to create an outstanding workplace experience. The company is offering its services to thousands of customers worldwide and global presence spanning the US, UK, UAE, Malaysia, and a team of experts in various other countries. Appspace's is working to assist companies in modernizing their workplace experience and ensuring a seamless transition to the digital era. Appspace's major business is segmented into the areas of platform and solutions. Also, the company has a dedicated software development team to develop and deploy services and solutions based on current market trends as well as current market trends. Appspace's software is designed to transform workplaces into dynamic and connected environments, empowering businesses to deliver relevant information, announcements, and multimedia content across multiple screens and devices. Whether it's digital signage in lobbies, employee communication on digital displays, or interactive kiosks, Appspace offers a comprehensive solution to enhance communication and engagement.

12.3. POPPULO

Type: Private

Industry: Software Development

Founded: 1996

Headquarters: Denver, Colorado, United States

Website: www.poppulo.com

12.3.1.COMPANY SUMMARY

Poppulo is a digital signage platform and solution company, engaged in design, develop and deployment of cloud products for array of industries including education, financial services, healthcare, hospitality & entertainment, manufacturing, retail, technology, transportation. Poppulo enables business and industries to create, deliver, and measure communications that drive employee engagement, and business success. The company has more than 4500+ clients globally operating more than 500,000+ digital signs including companies GSK, Rolls-Royce, Aon, Telefonica, and CDK Global. In March 2021, Four Winds Interactive and Poppulo entered into a definitive agreement and the combination of both these companies will be named as "Poppulo" and has been backed by Vista Equity Partners, a global investment farm focusing on enterprise software, data and technology-enabled business.

12.5. MVIX INC.

Type: Private

Industry: IT Services and IT Consulting

Founded: 2005

Headquarters: Sterling, Virginia, United States

Website: www.mvix.com

12.5.1. COMPANY SUMMARY

Mvix is a top provider of turnkey digital signage solutions, which include hardware, free digital signage software, content, and installation services. The company was founded in 2005 and headquarters in Serling, Virginia, United States. NASA, Sodexo, Discovery Channel, Newcomb Oil, Virginia Tech, University of Washington, Crowne Plaza, and Nike are among the approximately 15,000 clients who rely on the Mvix platform to power hundreds of displays throughout their campuses. Brands and industry experts have recognised the cloud-based software platform, which is unique in its integrations with several dynamic content APIs, as an innovative visual communication solution that enriches on-site digital experiences.

Mvix focuses on developing digital signage software, hardware, and content management systems (CMS) to help businesses and organizations create and manage dynamic visual displays. Their solutions cater to different sectors, including corporate offices, retail stores, hospitality, healthcare facilities, education institutions, transportation hubs, and other end-use industries. Mvix offers cloud-based content management systems that allow users to manage and update their digital signage content from a centralized platform. These systems typically provide control over multiple displays, playlist management, real-time monitoring, and content distribution.

12.6. NAVORI LABS

Type: Private

Industry: Software Development

Founded: 1997

Headquarters: Lausanne, Switzerland

Website: www.navori.com

12.6.1. COMPANY SUMMARY

Navori Labs is a software company that specializes in developing digital signage solutions and audience measurement software. Founded in 1997 and headquartered in Lausanne, Switzerland, Navori Labs has established itself as a provider of digital signage technology worldwide. Navori has over 20 years of experience in providing premium technologies and large-scale deployment expertise to customers worldwide. The open architecture multi-platform software is built in-house by a team of highly qualified engineers. The company also provides third-party certified cloud and on-premises products for government and enterprise use.

The company's core product is QL Digital Signage, a comprehensive software platform that enables businesses to create, manage, and display dynamic content on digital screens in various locations. QL Digital Signage offers features such as content scheduling, real-time data integration, remote management, and analytics, allowing organizations to effectively communicate with their target audience and enhance their brand presence. Navori Labs has built a strong reputation for delivering reliable and scalable digital signage solutions across a wide range of industries, including retail, transportation, corporate communications, hospitality, education, and more. Their software is known for its user-friendly interface, flexibility, and advanced functionality, and is ideal for both small businesses and large enterprises. Navori Labs has a global presence, with offices and partners in North America, Europe, Asia, and the Middle East.

12.7. VISIX, INC.

Type: Private

Industry: Software Development

Founded: 1980

Headquarters: Peachtree Corners, Georgia, United States

Website: www.visix.com

12.7.1.COMPANY SUMMARY

Visix, Inc. is a software development company that specializes in digital signage solutions. The company provides a range of software products and services designed to help organizations effectively communicate and engage with their audiences using visual displays. Founded in 1980 and headquartered in Atlanta, Georgia, Visix has established itself as a leader in the digital signage industry. The company's solutions are used by various sectors, including education, healthcare, corporate, government, and hospitality. Visix's goal is to help organizations enhance their internal and external communications, deliver dynamic content, and improve overall engagement.

Visix offers a comprehensive suite of software products to meet different customer needs. Their flagship product is AxisTV, a digital signage content management system (CMS) that enables users to create, manage, and schedule content for display across a network of screens. AxisTV provides a user-friendly interface, robust content creation tools, and advanced scheduling capabilities to streamline the process of managing digital signage. In addition to AxisTV, Visix offers other software solutions, including interactive wayfinding systems, room signs, and data visualization tools. These products are designed to help organizations create interactive and engaging experiences for their audiences while improving efficiency and productivity.

12.8. 22MILES INC.

Type: Private

Industry: Software Development

Founded: 2007

Headquarters: Peachtree Corners, Georgia, United States

Website: www.22miles.com

12.8.1.COMPANY SUMMARY

22 Miles is a leading provider of comprehensive digital signage and wayfinding solutions. The adaptable system is a forward-thinking platform that provides digital connectivity, visual communications, media management, and adaptive multipoint interactive experiences to organizations and facilities across all markets. Founded in 2007, the company has become a leading provider of interactive 3D wayfinding and digital signga for various industries including retail, healthcare, transportation, corporate, education and hospitality.

The 22 Miles platform is meticulously designed to deliver outstanding configurability, user-friendliness, and scalability, ensuring it caters to the diverse requirements of their esteemed clients. As a pioneering enterprise, 22 Miles was among the early adopters to offer content transfer to mobile devices, including custom mobile app development, and auguemnted reality wayfinding. In the corporate and education sector, the multifaced platform manages room booking, touchscreen multipurpose video walls, remote management, hundreds of pre-built templates, and data feeds, and provides comprehensive analytics. In addition, it offers seamless integration with industry leading tools developed by Microsoft, Crestron, Sony, Samsung, Zoom and Cisco. 22 Miles offers full-stack creative design and professional services, proficiently transforming ideas into captivating visual experiences enriched with an array of functionalities.

12.9. NOVISIGN DIGITAL SIGNAGE INC.

Type: Private

Industry: Technology, Information, and Internet

Founded: 2011

Headquarters: Kfar Saba, Israel

Website: www.novisign.com

12.9.1. COMPANY SUMMARY

NoviSign Digital Signage Inc. is a cloud-based digital signage software solutions. The company founded in 2011 in Israel and has since expanded to serve customers in over 160 countries worldwide. NoviSign's digital signage software allows businesses to create and manage dynamic content that can be displayed on digital screens, such as those found in retail stores, restaurants, transportation hubs, and other public spaces. The software includes a range of features, such as drag-and-drop content creation tools, customizable templates, real-time data integration, and remote management capabilities.

NoviSign's software designed and developed on a cloud-based Content Management System (CMS), which enables users to easily create and manage digital signage content from anywhere with an internet connection. The CMS also allows for real-time updates and scheduling, making it easy to manage multiple digital signage displays across various locations. In addition to its digital signage software solutions, NoviSign also offers a range of hardware options, including digital signage media players, touch screen displays, and kiosks. The company also provides installation and support services, as well as custom development solutions for businesses with unique digital signage needs.

12.10. SIGNAGELIVE

Type: Private

Industry: Software Development

Founded: 1997

Headquarters: Saffron Walden, Essex, United Kingdom

Website: www.signagelive.com

12.10.1. COMPANY SUMMARY

Signagelive, a worldwide digital signage provider founded in 1997, powers tens of thousands of screens spread across 46 countries and offers a multilingual cloud-based platform. The company has clients with a small handful of networks to deployments with thousands of sites. Signagelive provides services such as hosting, content storage, and technical support. Signagelive has made sure the platform is compatible with as many gadgets as is practical, including stand-alone media players from BrightSign, IAdea, and Chrome, as well as system on chip displays (SoC). Signagelive software is incorporated in various end-use industries including Food Service/QSR, Retail, Stadiums, Internal Communications, Education and Medical. The company's headquarters are located outside of Cambridge in the United Kingdom, with offices in Unites States (Chicago), Singapore, and Australia (Sydney).

12.12.   SKYKIT LLC

Type: Private

Industry: Software Development

Founded: 2016

Headquarters: Minneapolis, United States

Website: www.skykit.com

12.12.1.   COMPANY SUMMARY

Skykit is a digital signage platform and solution company, develop and design cloud products to scale businesses. The company started in the year 2016 and headquarters in Minneapolis, United States. The company offers comprehensive set of cloud-based digital signage solutions that enables organisations to provide compelling content, messages, and information across many displays, screens, and devices across tens of thousands of screens across the globe. Skykit scalable platform allows seamless content management and dissemination whether in a single location or over a worldwide network.

Skykit major business is segmented into the areas of skykit beam, skykit turf and skykit controls. The user-friendly interface and intuitive design of Skykit allows users to easily create, schedule, and update content in real-time. Also, skykit platform allows users to adapt information to specific audiences and locations, from eye-catching commercials and promotional campaigns to educational displays and corporate communications. The company offers its services and solutiobs for a broad range of clients across companies such as Canon, Marriot, Rapid, FedEx, Pepsi, Cocacola, Yale University, Arrive Logistics BetterCloud, Austin, Jack Links, and others.

12.13.   KORBYT

Type: Private

Industry: Software Development

Founded: 1990

Headquarters: Addison, Texas, United States

Website: www.korbyt.com

12.13.1.   COMPANY SUMMARY

Korbyt specializes in providing comprehensive digital communication and engagement solutions for businesses. With a focus on creating connected and immersive experiences, Korbyt helps organizations effectively communicate with their employees, customers, and stakeholders through various digital channels. The core offering of Korbyt is its robust digital signage platform. This platform allows businesses to design, manage, and deliver dynamic and interactive content across a wide range of devices, including digital displays, video walls, mobile devices, and kiosks. With Korbyt's intuitive content management system, users can easily create and customize visually appealing content, incorporate multimedia elements, and schedule content distribution to specific screens or locations. Korbyt's solutions are designed to be scalable and adaptable, catering to businesses of all sizes and industries. Whether it's corporate offices, retail stores, hospitality venues, healthcare facilities, or educational institutions, Korbyt's platform can be tailored to meet the specific needs and requirements of different environments.

12.14.   CAROUSEL DIGITAL SIGNAGE

Type: Private

Industry: Software Development

Founded: 1997

Headquarters: Minneapolis, Minnesota, United States

Website: www.carouselsignage.com

12.14.1.   COMPANY SUMMARY

Carousel digital signage software provides solutions for signage and content management. Carousel Digital Signage Software, established in 1997, is a company owned by Tightrope. Tightrope also owns Cablecast Community Media. It utilizes collaboration, dynamic playlists, data feeds, and scalable server software to deliver these services. The software supports BrightSign, Apple TV, and Windows media player. The company aims to address the needs of corporate digital signage clients. The platform of Carousel enables businesses to software, Carousel empowers businesses to maintain engaging and up-to-date content on their platforms.

13. COMPANY PROFILES (SYSTEM INTEGRATOR)

13.1. IES COMMUNICATIONS, LLC

Type: Private

Industry: Telecommunications

Founded: 1998

Headquarters: Tempe, Arizona, United States

Website: www.iescomm.com

13.1.1. COMPANY SUMMARY

IES Communications, LLC is a telecommunications firm that creates, deploys, and manages digital signage integration and video messaging for businesses. It is a subsidiary of IES Holdings, Inc. The company was founded in the year 1998 and headquartered in Tempe, Arizona, United States. The company is present in more than 90 locations in the United States. IES Communications also provides special system services, that include Audio Visual Design Installation, Security Camera Systems, and Life Safety Systems. IES deploys a superior maintenance and services department that provides companies with customization according to their needs. IES communications harness the benefits of Audio Visual enhancements for company's communication and marketing.

13.1.2.   FINANCIAL INSIGHTS

IES Communications, LLC is a telecommunications firm that creates, deploys, and manages digital signage integration and video messaging for businesses. The company founded in the year 1998 and headquarters in Tempe, Arizona, United States.

Net Sales

Bar chart showing Revenue in USD Million:
- 2021: 1,537.00
- 2022: 1,800.00
- 2023: 2,130.03

■ Revenue in USD Million
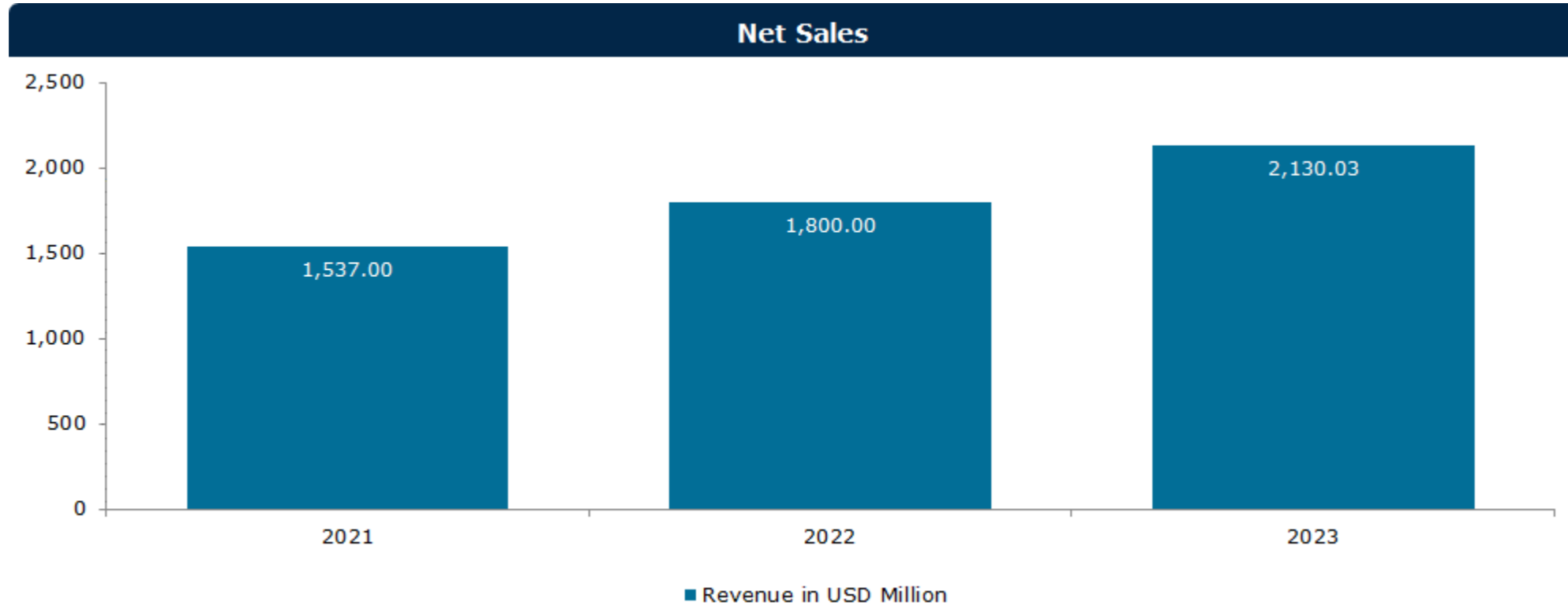
Source: Company Website, News & Press Releases

13.2. AVI-SPL, LLC

Type: Private

Industry: IT Services and IT Consulting

Founded: 1979

Headquarters: Tampa, Florida, United States

Website: www.avispl.com

13.2.1. COMPANY SUMMARY

AVI-SPL is a provider of digital enablement solutions that revolutionize the way individuals and technology interact, enhancing experiences, generating fresh value, and empowering organizations to flourish and expand. The company founded in the year 1979 and headquarters in Tampa, Florida, United States. AVI-SPL deliver digital signage solutions and services for more than 100,000+ projects in 80+ countries.

AVI-SPL major business is segmented into the key areas of solutions and services. The company has skilled resources that specialize in strategizing, designing, deploying, managing, and supporting user-friendly, scalable, maintainable, and measurable audiovisual (AV) and unified communications (UC) solutions by ensuing that these solutions effectively meet the business objectives of our clients. AVI-SPL has established enduring partnerships with major manufacturers in the AV and UC industries, some of its major technology partners are Crestron, Sharp/NEC, Logitech, Plantronics (poly) and others.

13.2.2. FINANCIAL INSIGHTS

AVI-SPL is a globally recognized digital enablement solutions provider specializing in audiovisual (AV) and unified communications (UC) technologies. The company exclusively partners with vendors who prioritize exceptional service at every stage of the customer journey.

Net Sales

- 2021: 1,160.00
- 2022: 1,350.00
- 2023: 1,467.43

Revenue in USD Million
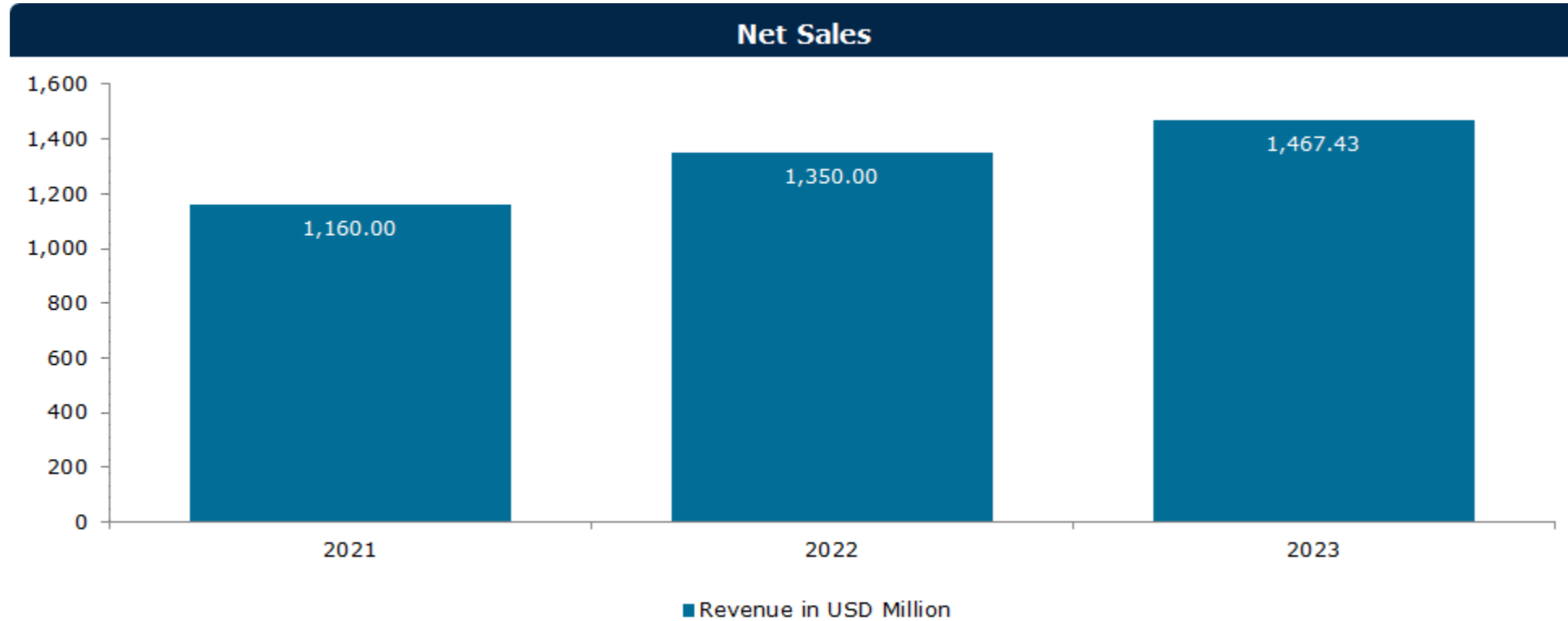
Source: Company Website, News & Press Releases

13.3. AVI SYSTEMS

Type: Private

Industry: IT Services and IT Consulting

Founded: 1974

Headquarters: Eden Prairie, Minnesota, United States

Website: www.avisystems.com

13.3.1.   COMPANY SUMMARY

AVI System is a major provider of audio-visual services worldwide. AVI Systems has an extensive customer base spans across globe, and as an employee driven company. The company founded in the year 1974 and headquarters in Eden Prairie, Minnesota, United States. AVI Systems has business presence 16 offices throughout United States, with more than 28 locations in the United States, and the ability to operate in 164 cities in 50 countries. The company has a wide array of partners across the industry including Cisco, LG, Samsung, leagrand, NEC, Panasonic, Sony, Bose, Barco, and others.

AVI Systems business is majorly segmented into the areas of solutions such as, Audio Visual Solutions, Digital media solutions, managed services and solutions, broadcast, Unified Collaboration Solutions, and others. The company has completed more than 3,500 projects annually.

13.3.2. FINANCIAL INSIGHTS

AVI System is a major provider of audio-visual services worldwide. AVI Systems has an extensive customer base spans across globe, and as an employee driven company. The company founded in the year 1974 and headquarters in Eden Prairie, Minnesota, United States.

Net Sales
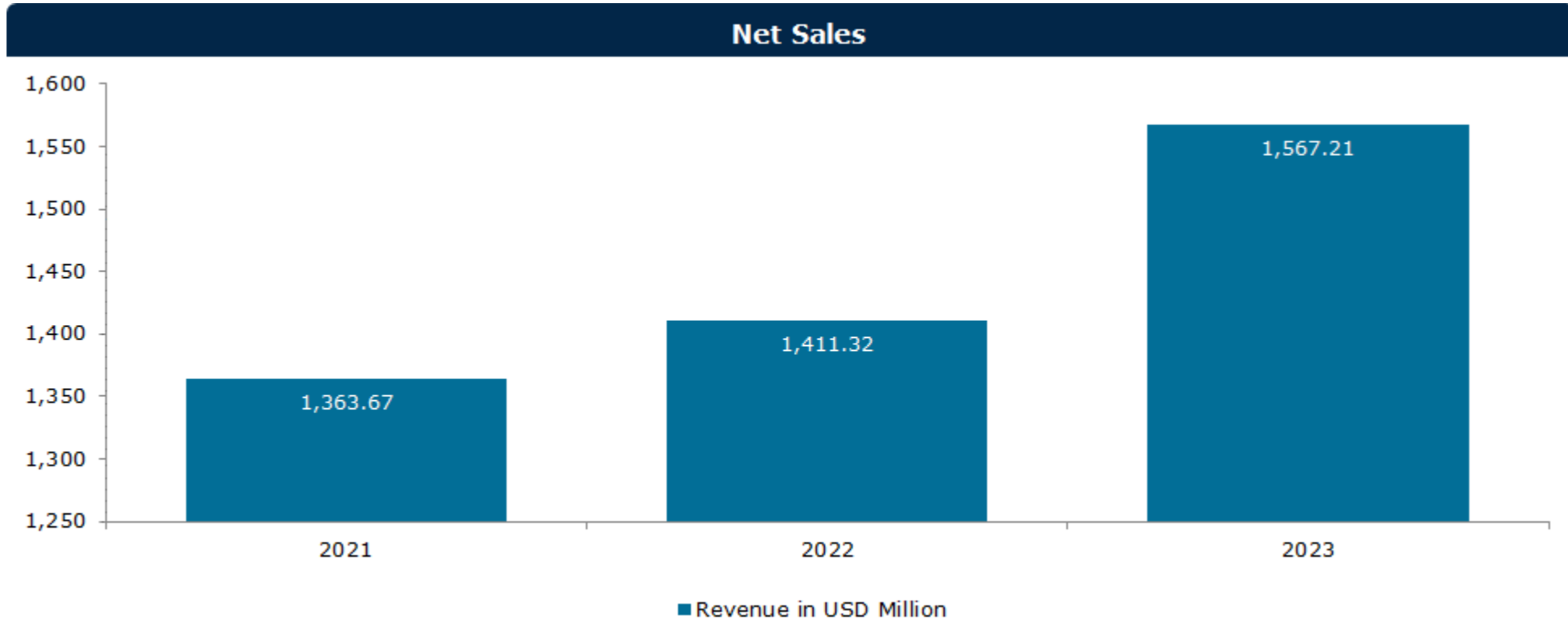
Source: Company Website, News & Press Releases

13.4. DIVERSIFIED

Type: Private

Industry: IT Services and IT Consulting

Founded: 1993

Headquarters: Kenilworth, New Jerswey, United States

Website: www.onediversified.com

13.4.1. COMPANY SUMMARY

Diversified is a full-service systems and media technology integration company. The company is addressing major technical requirements of sectors such as broadcasting, audio-visual, IT, and RF. Diversified offering its solutions to wide range of markets, including financial services, media and entertainment, enterprise, energy, higher education, technology, healthcare, hospitality, government, and various others. The company has a global presence in more than 40+ countries.

Diversified business is majorly segmented into the areas of solutions and services. The company specializes in the integration and maintenance of technology solutions both domestically in the United States and internationally across the globe. The company has built strong partnerships with numerous large multinational clients to implement enterprise solutions across North America, South America, Europe, Southeast Asia, and the Middle East. Some of its major clients or brands include Barco, Logitech, Samsung, Sony, LG, Legrand, Harman, and others.

13.4.2. FINANCIAL INSIGHTS

Diversified is a full-service systems and media technology integration company. The company has built strong partnerships with numerous large multinational clients to implement enterprise solutions across North America, South America, Europe, Southeast Asia, and the Middle East.

Net Sales

- 2021: 878.21
- 2022: 990.45
- 2023: 1,154.42

■ Revenue in USD Million
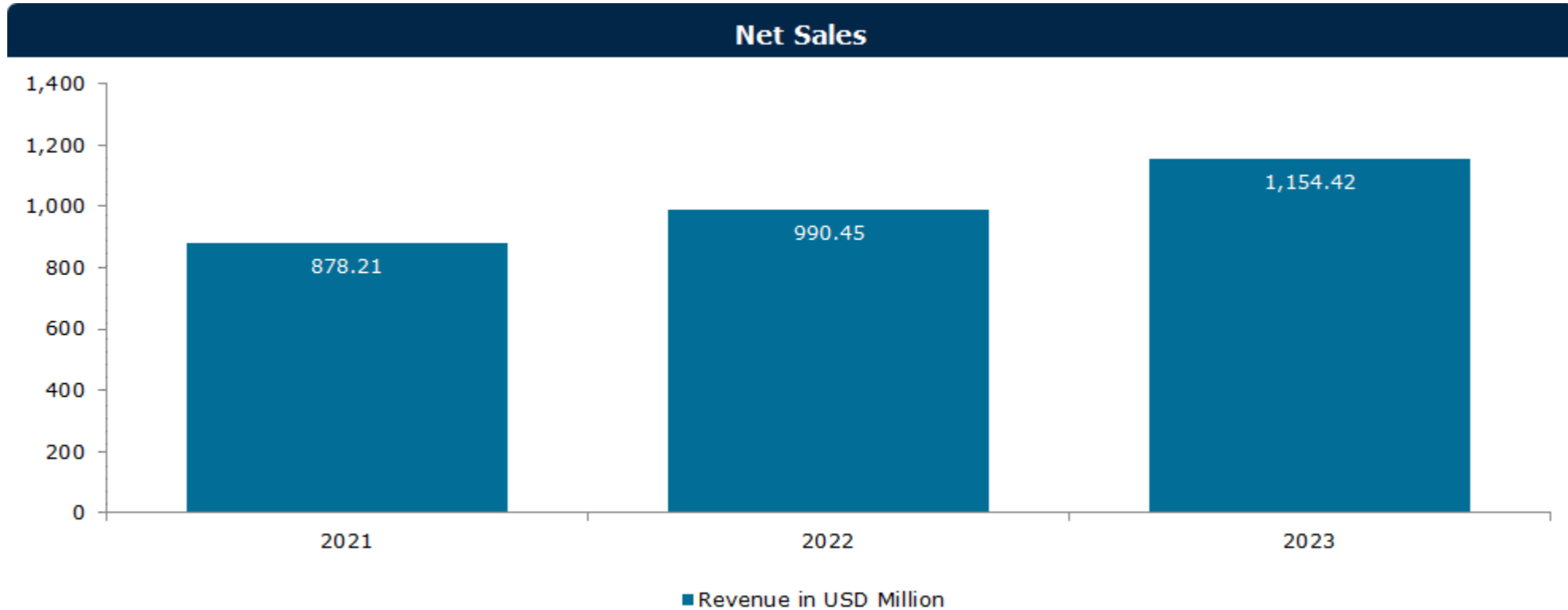
Source: Company Website, News & Press Releases

13.5. SOLUTIONZ INC

Type: Private

Industry: IT Services and IT Consulting

Founded: 2001

Headquarters: Los Angeles, California, United States

Website: www.solutionzinc.com

13.5.1. COMPANY SUMMARY

Solutionz is a major integrator, technologists, engineers, experts, support technicians, designers, and trusted allies, to assist consumers in improving business practices and achieving better outcomes. The company founded in the year 2001 and headquarters Los Angeles, California, United States. Solutionz is offering its solutions and services across a wide range of industries including law firms, healthcare providers, government agencies, educational institutions, and various other industries. The

Solutionz business is majorly segmented into specialized areas such as integrated maintenance, cloud-based solutions, managed services, bridging services, cybersecurity, and grant program services and others. The company offers AMX ACE Audio, Control, Digital Signage, RMS, Signal Management, and Installation Certified solutions for its clients. Some of its major clients include Neat, Bosch, Cisco, Creston, AVTEQ, Ploy, Biamp Systems, and others.

13.5.2.FINANCIAL INSIGHTS

Solutionz is a major integrator, technologists, engineers, experts, support technicians, designers, and trusted allies, to assist consumers in improving business practices and achieving better outcomes. The company founded in the year 2001 and headquarters Los Angeles, California, United States.

Net Sales

- 2021: 224.11
- 2022: 259.48
- 2023: 307.43

Revenue in USD Million
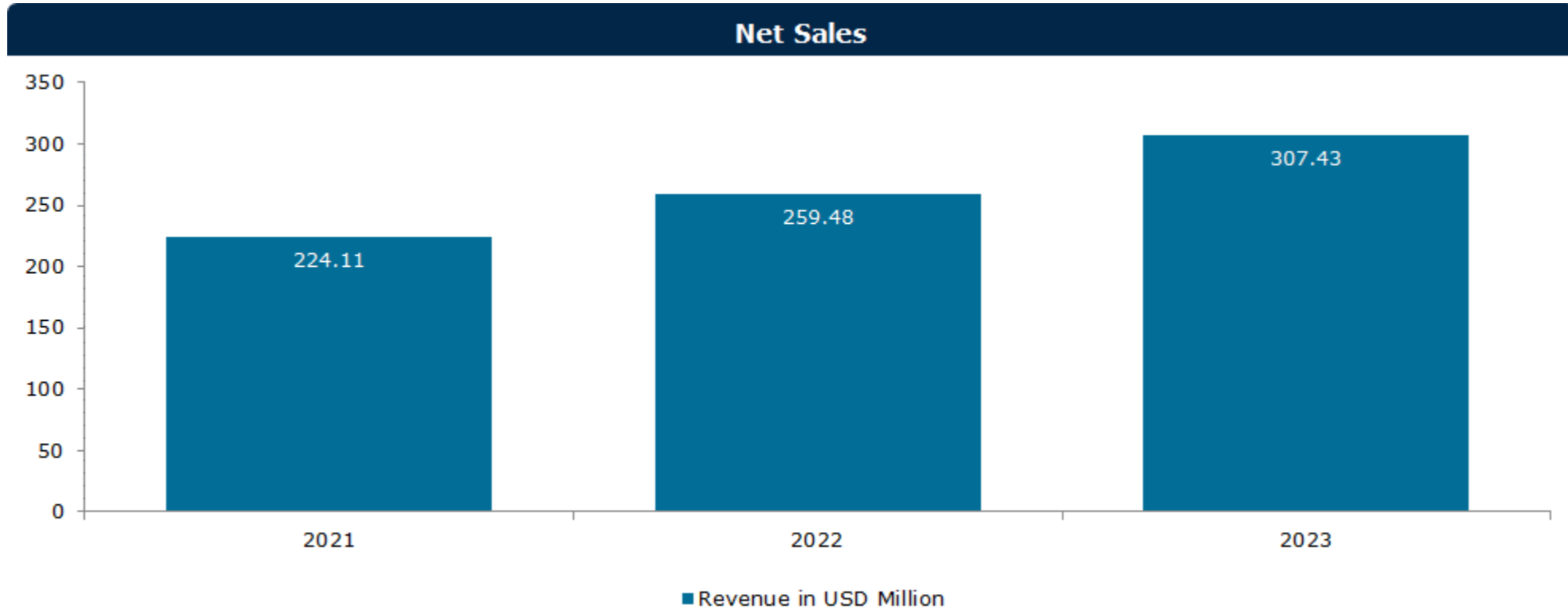
Source: Company Website, News & Press Releases

13.6. GROUPE SOLOTECH INC.

Type: Private

Industry: Entertainment Providers

Founded: 1977

Headquarters: Montreal, Québec, United States

Website: www.solotech.com

13.6.1.COMPANY SUMMARY

Solotech is a global leader in audio-visual and entertainment technology company, offering its solutions such as live production, system integration, virtual technology, equipment in an array of industries. The company delivered over 10,000 projects annually and supporting numerous well-known projects around the world including Resorts World Las Vegas, Bridgestone Arena, Burj Khalifa, Caesars Palace, The Rady Shell at Jacobs Park, Montreal International Jazz Festival, Ubisoft, and others.

Solotech major business is segmented into the areas of live production, system integration, virtual technology, equipment, and others. Solotech business has a global presence in more than 18+ countries, partnering with 300 manufacturers, acquired more than 8 companies.

13.6.2.FINANCIAL INSIGHTS

Solotech is a global leader in audio-visual and entertainment technology company, offering its solutions such as live production, system integration, virtual technology, equipment in an array of industries.

Net Sales

- 2021: 175.65
- 2022: 225.43
- 2023: 345.76

■ Revenue in USD Million
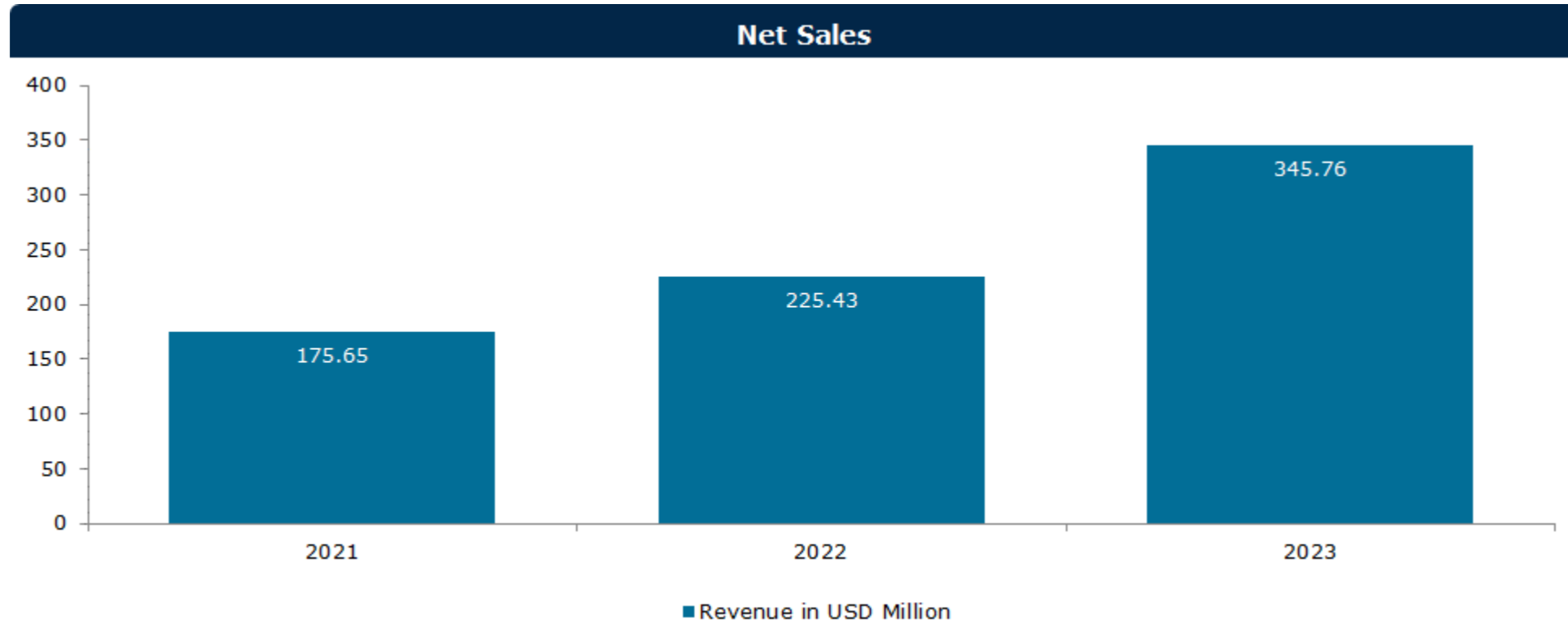
Source: Company Website, News & Press Releases

13.7. AVMI KINLY LTD

Type: Private

Industry: IT Services and IT Consulting

Founded: 1990

Headquarters: Amsterdam, Netherlands

Website: www.kinly.com

13.7.1.COMPANY SUMMARY

Kinly is a global IT services and consulting company, engaged in providing an array of AV and UCC solutions and services that allow industries to deliver exceptional quality productivity for companies. The company was founded in the year 1990 and headquarters are in Amsterdam, Netherlands. Kinly has 2500+ customers globally with a business presence in 9 countries and 20 offices globally. Kinly has wide array of cllients spread across different indutsries, some of its major clients are Miccrosoft, Cisco, Logitech, Google, Poly, Creston, LG, Sharp, Sony, Lenovo, Hp, Bose, Epson, Yealink, Signy, Epson.

Kinly business is majorly segmented into the areas of solutions and services. Kinly is a globally recognized provider of comprehensive workspace transformation services. The unparalleled expertise sets apart from the competition, as no other company can match what Kinly offer. With a strong global presence, Kinly is committed to delivering exceptional solutions tailored to meet customers' unique requirements. As a trusted partner to the world's major AV vendors, Kinly ensures that solutions are of the highest quality and perfectly aligned with customers' needs.

13.7.2.FINANCIAL INSIGHTS

Kinly is a global IT services and consulting company, engaged in providing an array of AV and UCC solutions and services that allow industries to deliver exceptional quality productivity for companies.
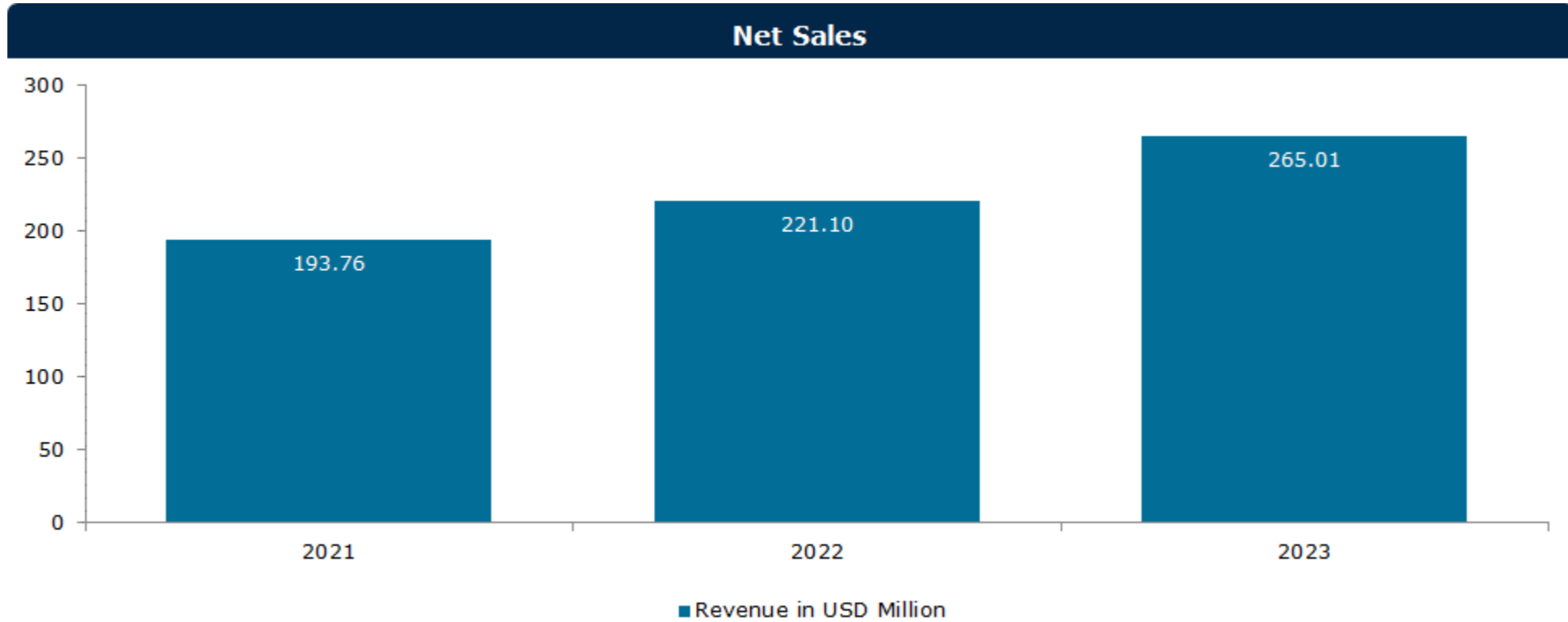
Source: Company Website, News & Press Releases

13.8. PAVION

Type: Private

Industry: Information Services

*Founded: 1998*

Headquarters: Chantilly, Virgini, United States

Website: www.pavion.com

13.8.1.COMPANY SUMMARY

Pavion connects and protects customers by offering integrated fire, safety, security, and essential communications solutions. Pavion's focus is on linking and safeguarding individuals and organizations by delivering comprehensive solutions for fire safety, security, and communication integration. They serve a wide range of customers across 48+ locations in the United States and 22 countries worldwide. With their extensive expertise, Pavion caters to clients in various sectors including enterprise, healthcare, education, government, data center, and retail. Their goal is to revolutionize safety, security, and communication by employing advanced technology and exceptional service, aiming to bring about clarity and transformation in these areas. The primary objective of Pavion is to revolutionize safety, security, and communication by introducing innovative technology and delivering exceptional service. They are dedicated to serving their customers, employees, and communities, prioritizing their needs, and fostering positive change.

13.8.2.FINANCIAL INSIGHTS

Pavion connects and protects customers by offering integrated fire, safety, security, and essential communications solutions. They serve a wide range of customers across 48+ locations in the United States and 22 countries worldwide.

Net Sales
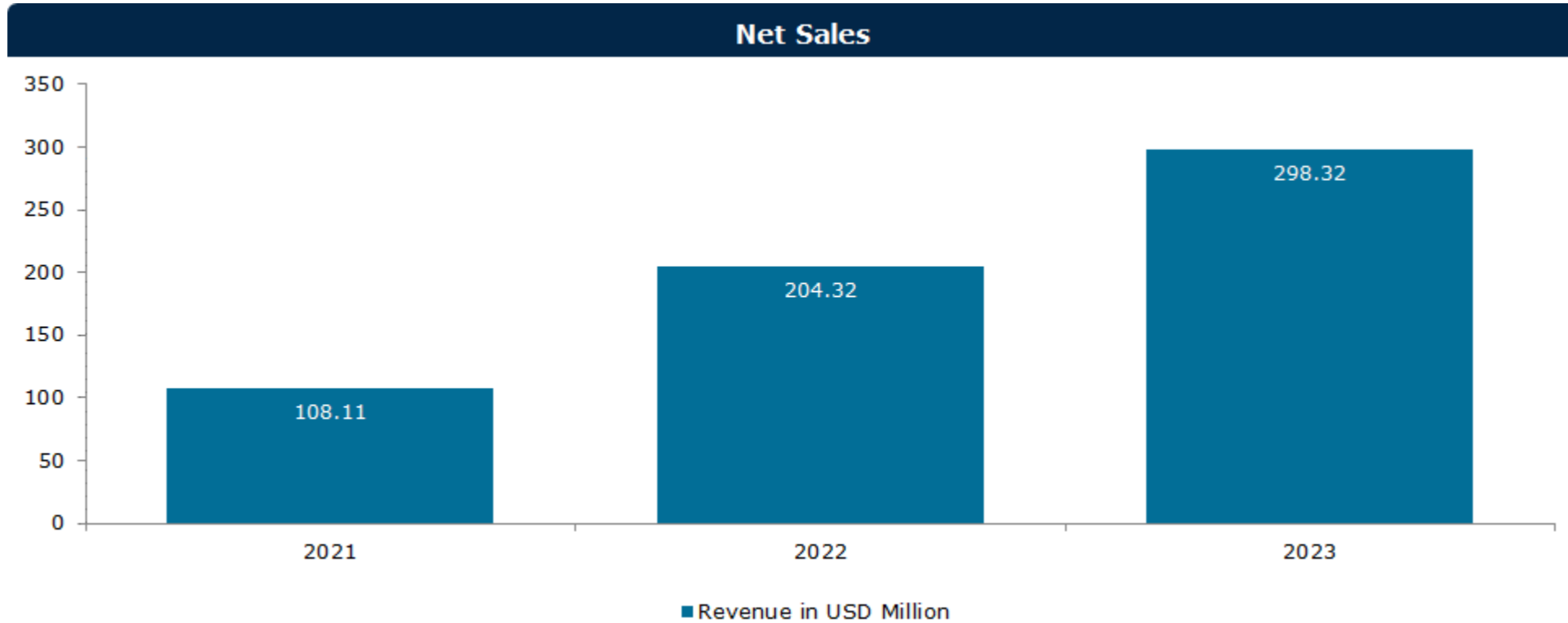
Source: Company Website, News & Press Releases

13.9. AVIDEX INDUSTRIES, LLC

Type: Private

Industry: IT Services and IT Consulting

Founded: 2003

*Headquarters: Cary, North Carolina, United States*

Website: www.avidex.com

13.9.1. COMPANY SUMMARY

Avidex is a pioneering leader in the field of audiovisual and collaboration solutions, specializing in design, integration, project management, equipment procurement, and support services. Their team comprises experienced veterans in the audiovisual industry who have successfully created and integrated numerous unified collaborations and audiovisual solutions. Avidex collaborates effectively with clients, ensuring the implementation of AV, collaboration, and multimedia technologies that align with their communication objectives. With their extensive expertise, Avidex's AV experts are equipped with the knowledge and background to deliver exceptional experiences when it comes to deploying audiovisual and multimedia technologies for any project, event, or facility. Apart from system design, installation, and rental services, Avidex also offers an extensive range of managed services and support options. These include the provision of full-time on-site staff and audiovisual asset management. Avidex's successful track record extends to international projects in Europe and Asia, spanning multiple countries, as well as completed projects across 26 states. Avidex stands as a comprehensive and reliable single source for all audiovisual and unified collaboration needs.

13.9.2.FINANCIAL INSIGHTS

Avidex is a pioneering leader in the field of audiovisual and collaboration solutions, specializing in design, integration, project management, equipment procurement, and support services.

Net Sales

- 2021: 150.50
- 2022: 175.09
- 2023: 215.30

■ Revenue in USD Million
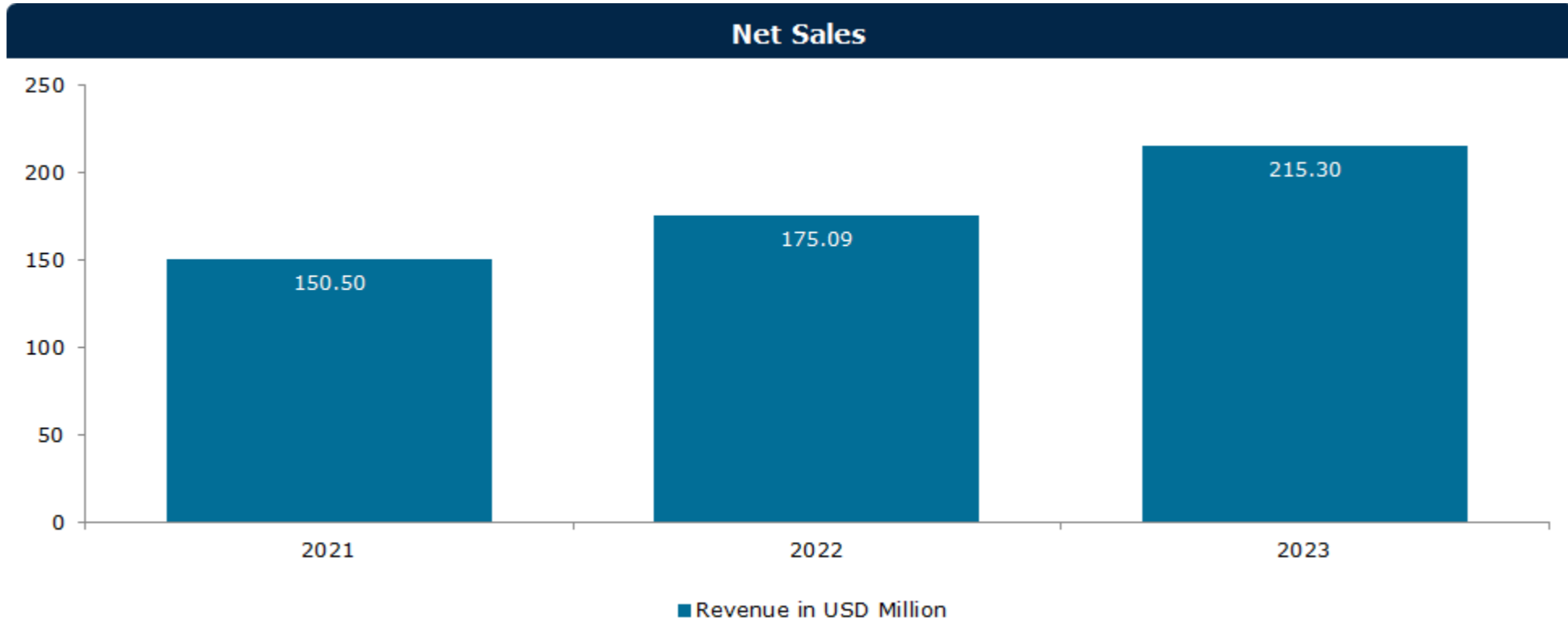
Source: Company Website, News & Press Releases

13.10.   FORD AUDIO-VIDEO, LLC

Type: Private

Industry: IT Services and IT Consulting

Founded: 1973

*Headquarters: Oklahoma City, United Stated*

Website: www.fordav.com

13.10.1.   COMPANY SUMMARY

Ford AV specializes in the design, installation, and maintenance of professional and commercial sound, audio-video, network infrastructure, and security surveillance systems. Their client base encompasses a wide range of organizations, including businesses, educational institutions, churches, entertainment venues, government facilities, healthcare centers, performing arts venues, sporting arenas, and transportation hubs. With a particular focus on enterprise-level solutions, Ford AV has successfully deployed systems across various locations in the United States and internationally. The company specializes in enterprise-level technology solutions. They install AV, IT, and security systems across the U.S. as well as internationally for businesses, schools, government facilities, churches, entertainment centers, healthcare facilities, performing arts centers, sporting venues, and transportation centers. Ford AV boasts a rich history of 50 years in undertaking AV technology projects worldwide. With a workforce of over 500 employees spanning the country, they handle more than 700 projects annually. This extensive team brings forth a wealth of experience and expertise, ensuring that their next project is executed with utmost success.

13.10.2.　FINANCIAL INSIGHTS

Ford AV specializes in the design, installation, and maintenance of professional and commercial sound, audio-video, network infrastructure, and security surveillance systems.
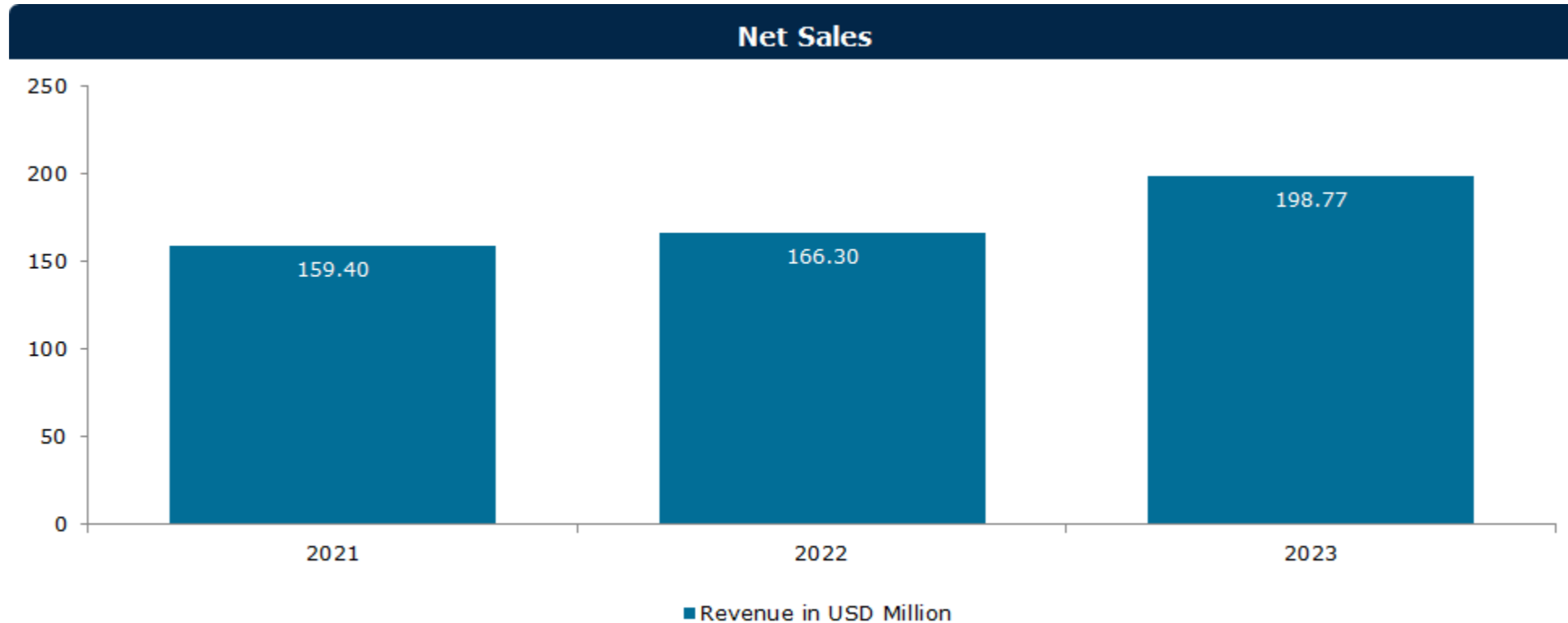
Source: Company Website, News & Press Releases

DISCLAIMER

Reports and surveys are based purely on data or information accumulated from the authorized personals not limited to stakeholders and field marketing executives of reputed companies, brands, organizations or bodies. The information is also derived based on further discussion with subject matter experts heading the practice or at reputed companies.

The data in our market research report should be used as indicative guidance only. Experts at Emergen Research and 22Miles assert that no business including but not limited to investments should be made purely on the data presented in these reports. We highly recommend that business owners or stakeholders should seek professional advice before making a business decision.

Any resale, lending, disclosure or reproduction of this publication can only be made with prior written permission from Emergen Research and 22Miles. Transmission and/or reproduction of this document by any means or in any form (includes photocopying, mechanical, electronic, recording or otherwise) are prohibited without the permission of Emergen Research and 22Miles.

22MILES
DIGITAL SIGNAGE & WAYFINDING

145 Technology Pkwy
Suite 200
Peachtree Corners GA
30092
(408) 933-3000

sales@22miles.com
www.22Miles.com