Digital Signage Software Market
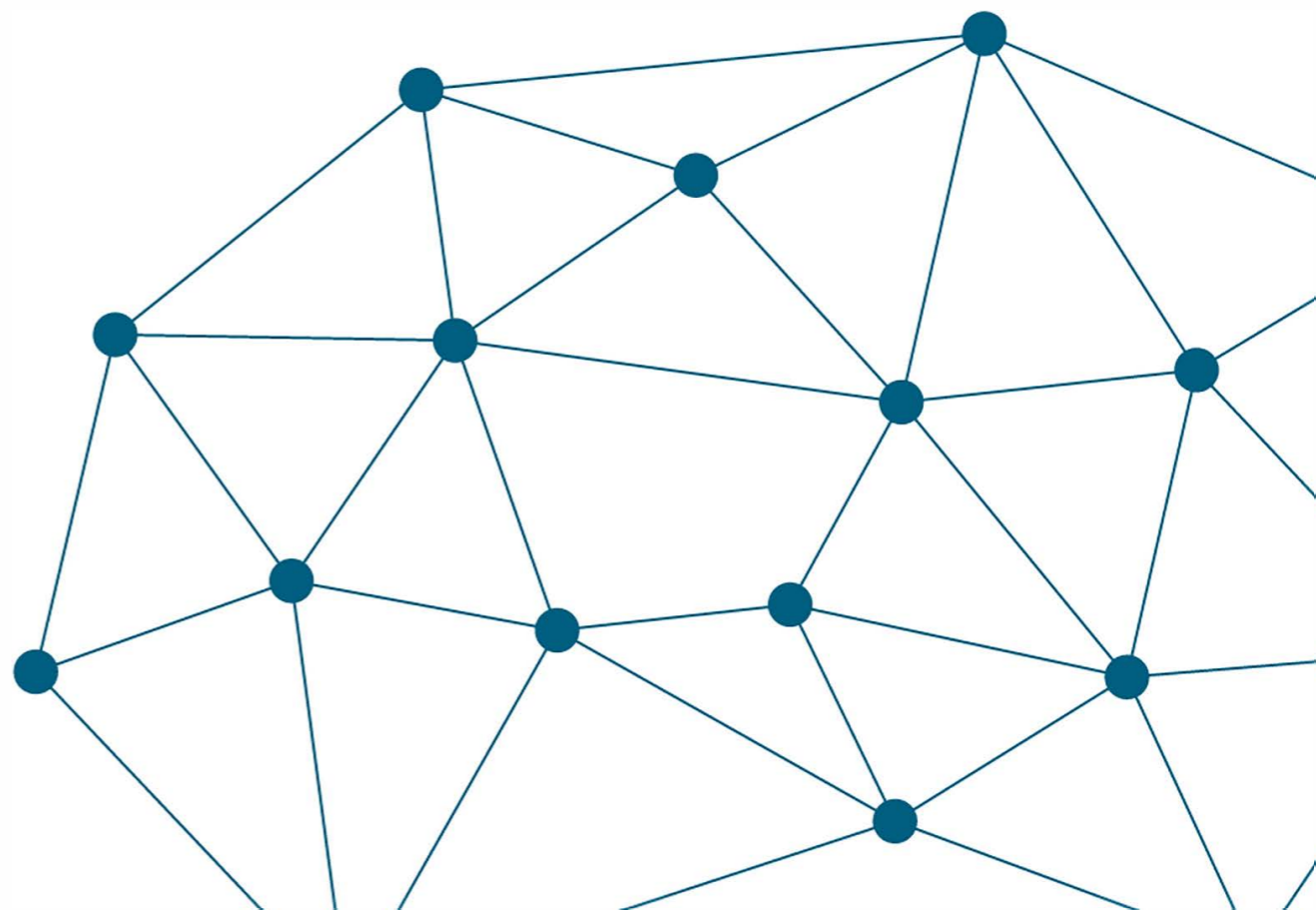
North America, Europe, and Asia Pacific Market Trend Analysis and Forecasts to 2032

ABOUT US

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IMPORTANT: This complimentary version does not include all the data provide in the full report.
To inquire about receiving the full report, please send us a request at www.22miles.com/contact-us.

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 s 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 2022 and a yearly forecast from 2023 to 2032 in terms of revenue (Millions USD). 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

2021 — HISTORICAL YEAR

2022 — BASE YEAR

2023 — ESTIMATED YEAR

2032 — FORECAST YEAR
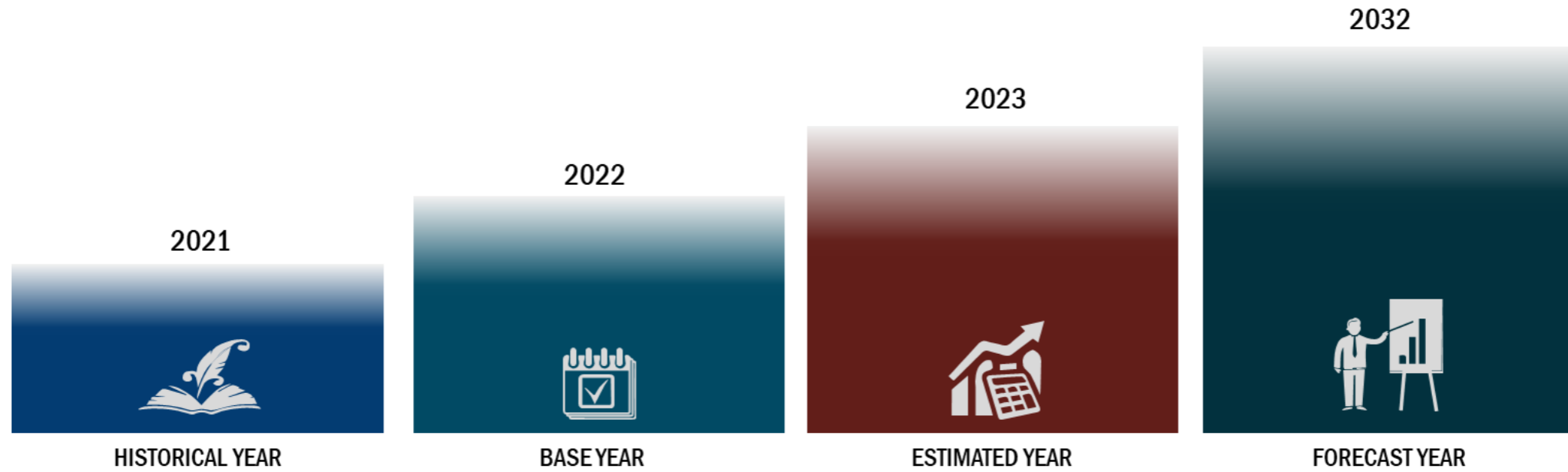
1.3. RESEARCH METHODOLOGY

A research methodology is a systematic approach for assessing or conducting a market study. Researchers tend to draw on a variety of both qualitative and quantitative study methods, inclusive of investigations, survey, secondary data, and market observation.

Such plans can focus on classifying the products offered by leading market players or simply use statistical models to interpret observations or test hypotheses. While some methods aim for a detailed description of the factors behind an observation, others present the context of the current market scenario.

1.3.1. SECONDARY RESEARCH MODEL

Extensive data is obtained and cumulated on a substantial basis during the inception phase of the research process. The data accumulated is consistently filtered through validation from the in-house database, paid sources as well reputable industry magazines.

A robust research study requires an understanding of the overall value chain. Annual reports and financials of industry players are referred thoroughly to have a comprehensive idea of the market taxonomy.

1.3.2. PRIMARY RESEARCH MODEL

Post conglomeration of the data obtained through secondary research; a validation process is initiated to verify the numbers or figures. This process is usually performed by having a detailed discussion with the industry experts. Discussions with the subject matter experts were conducted to obtain quantitative and qualitative information and validate our market research findings.

However, we do not restrict our primary interviews only to the industry leaders. Our team covers the entire value chain while verifying the data. A significant number of suppliers, and stakeholders are interviewed to make our findings authentic. The current trends, which include the drivers, restraints, and opportunities, are also derived through the primary research process.

FIGURE 2. PRIMARY INTERVIEW BREAKDOWN: DIGITAL SIGNAGE SOFTWARE MARKET

PRIMARY INTERVIEW BREAKDOWN: DIGITAL SIGNAGE SOFTWARE MARKET

Regional Respondents: Digital Signage Software Market

- 41%
- 32%
- 27%
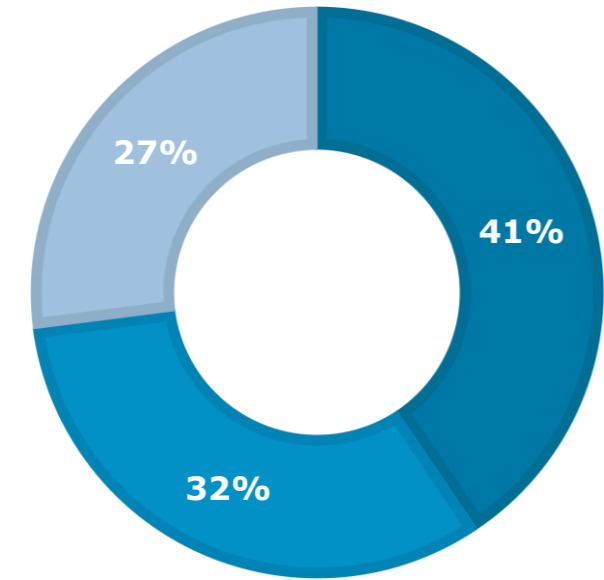
■ Asia-Pacific ■ North America ■ Europe

Respondents Category:

- 33%
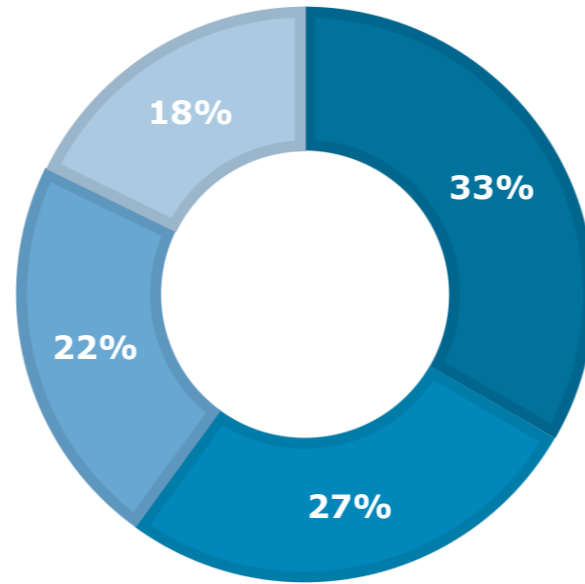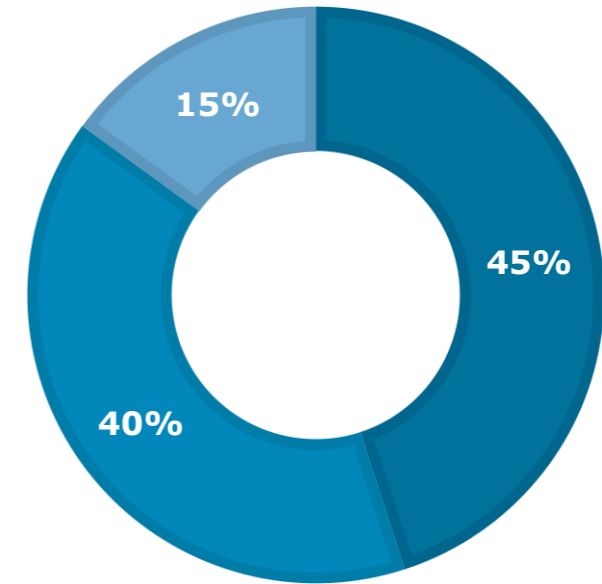- 27%
- 22%
- 18%

■ Manager ■ C Level Executive ■ Director & VP ■ Others

Stakeholders Domain

- 45%
- 40%
- 15%

■ COO/EVP/VP/Executives ■ Manufacturer ■ Industry Experts

1.4.   MARKET ESTIMATION

The market estimation is conducted by analyzing the data collected through both secondary and primary research. This process involves market breakdown, bottom-up and top-down approach.

Moreover, while forecasting the market a comprehensive statistical time series model is designed for each market. Macroeconomic indicators have been taken into consideration to understand the current trends of the market. Our data triangulation method verifies final market estimates by each data point.

Top-down, as well as the bottom-up approach, were used for the estimation and validation of the market. These methods were applied extensively for the estimation of the market size of the sub-segments as well. Key stages for the market estimation included:

- Identification of the key players in the industry through extensive secondary research
- Determination of the industry's supply chain and market size (in terms of value) through primary and secondary research processes.
- Determination of percentage shares, splits, and breakdowns of each sub segments using secondary sources and its validation through primary sources.

FIGURE 5. DATA TRIANGULATION
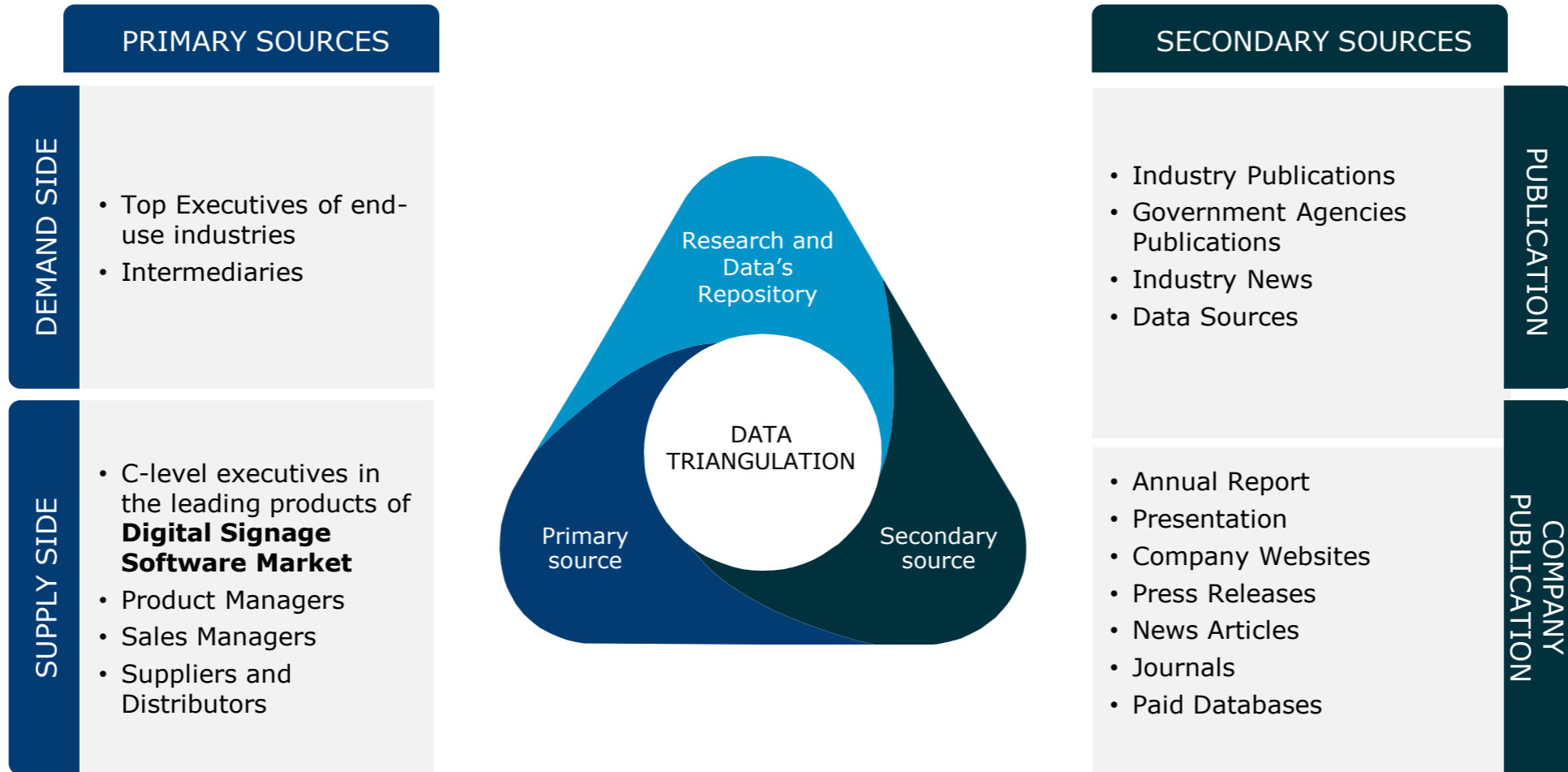
PRIMARY SOURCES

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 1,667.6 Million in 2022 and is expected to grow at a CAGR of 21.3% in terms of value in the forecast period 2023 to 2032.

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.

Various partnerships and collaborations between major CMS software manufacturers and key market players for implementation of Digital Signage Software systems in vehicles such as Electric Vehicles, which is boosting the growth of this market. For instance, on 21 March 2023, work with Vistar on this integration closely aligns with our broader vision to make digital-out-of-home more accessible to modern media buyers, so that OOH can ultimately represent a larger portion of omnichannel media buys. Furthermore, on 2 June 2022, Scala introduced the latest edition of its flagship digital signage technology, Scala Enterprise version 12.70, with a greatly enhanced

codebase to allow for faster new feature development. The enhancements in Enterprise 12.70 are directly related to the yearly growth in the level of sophistication and advancement of digital signage among Scala clients. The business is building a top-notch CMS platform that keeps up with the needs of the target market's expanding consumer base.

FIGURE 6. DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY CMS TYPE, 2022 & 2032 (USD MILLION)
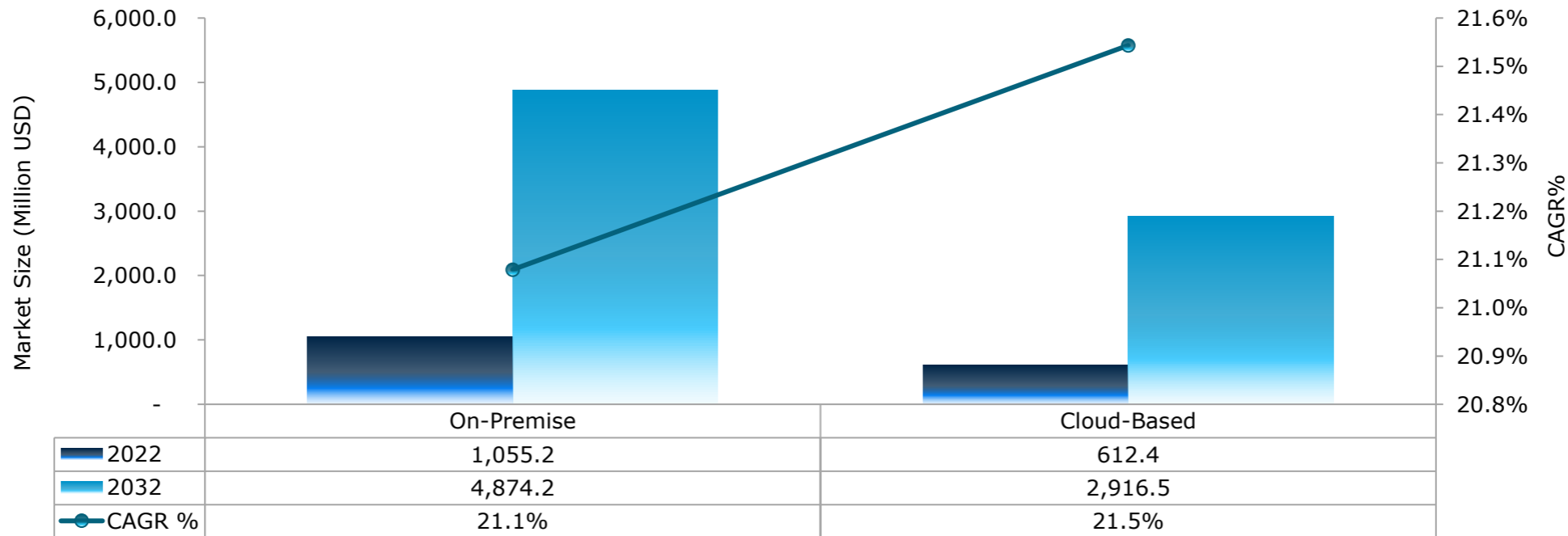
	On-Premise	Cloud-Based
2022	1,055.2	612.4
2032	4,874.2	2,916.5
CAGR %	21.1%	21.5%

FIGURE 7. DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY SERVICE TYPE, 2022 & 2032 (Millions USD)
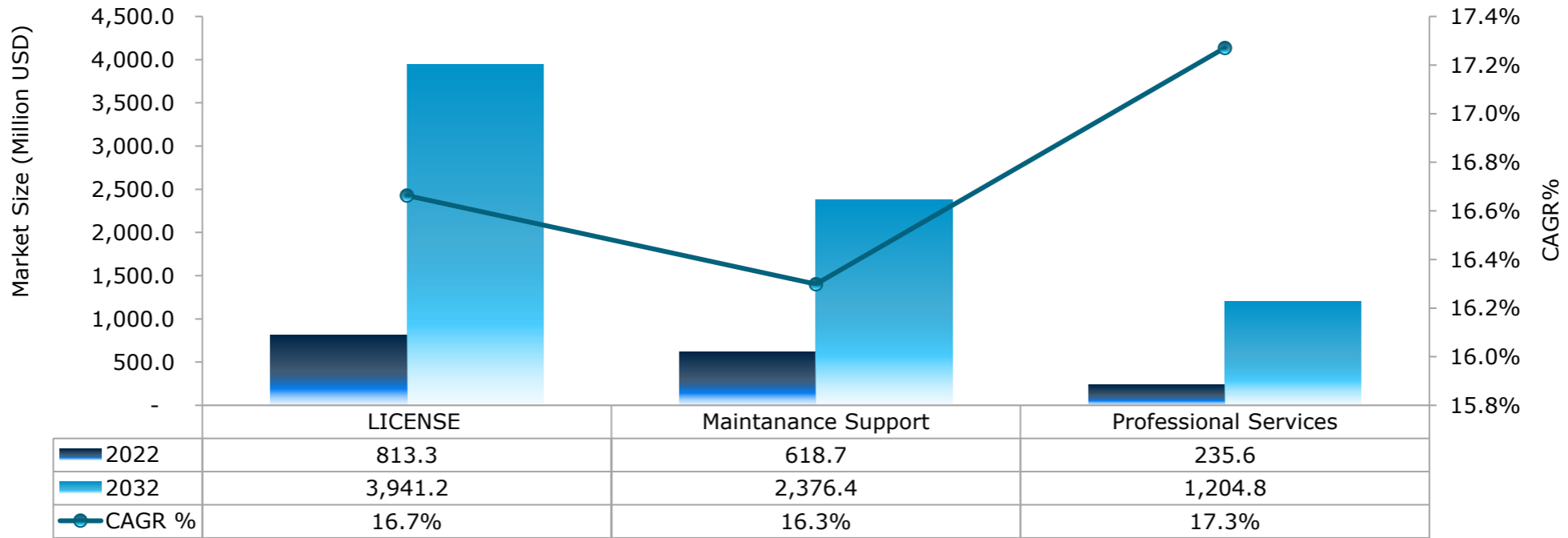
	LICENSE	Maintanance Support	Professional Services
2022	813.3	618.7	235.6
2032	3,941.2	2,376.4	1,204.8
CAGR %	16.7%	16.3%	17.3%

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

FIGURE 8. DIGITAL SIGNAGE SOFTWARE MARKET SEGMENTATION OUTLOOK BY PRICING MODEL, 2022 & 2032 (Millions USD)

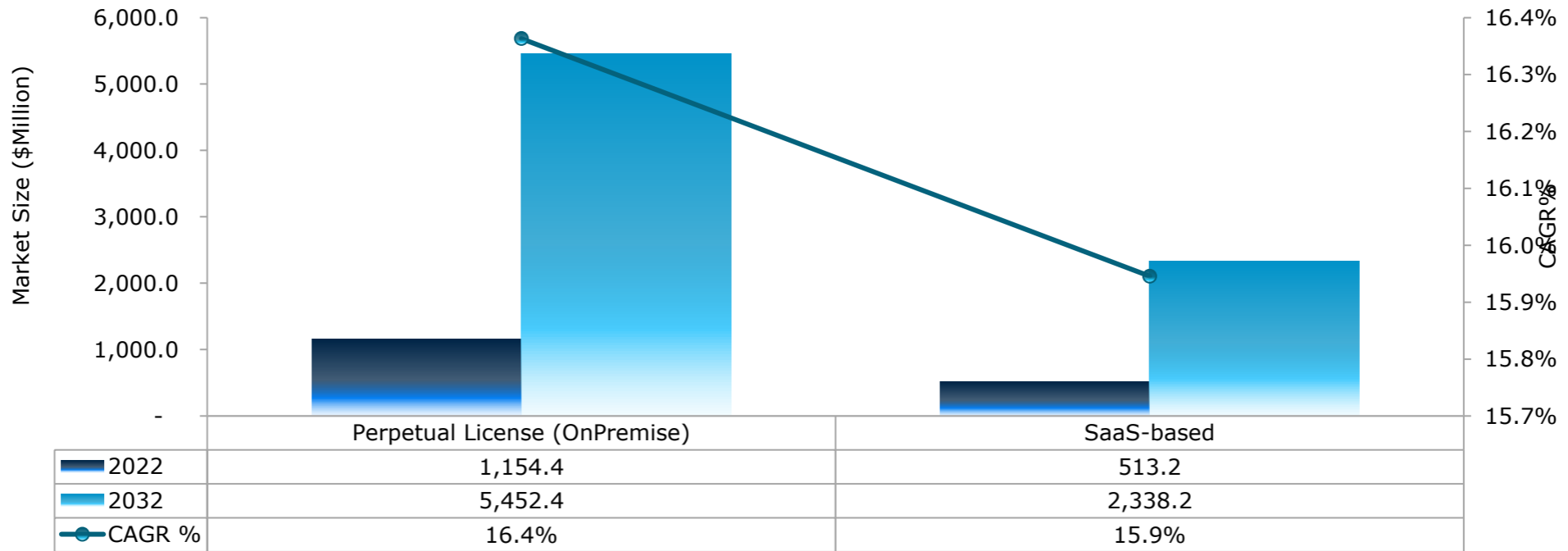|	Perpetual License (OnPremise)	SaaS-based
2022	1,154.4	513.2
2032	5,452.4	2,338.2
CAGR %	16.4%	15.9%

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, 2022 & 2032 (Millions USD)

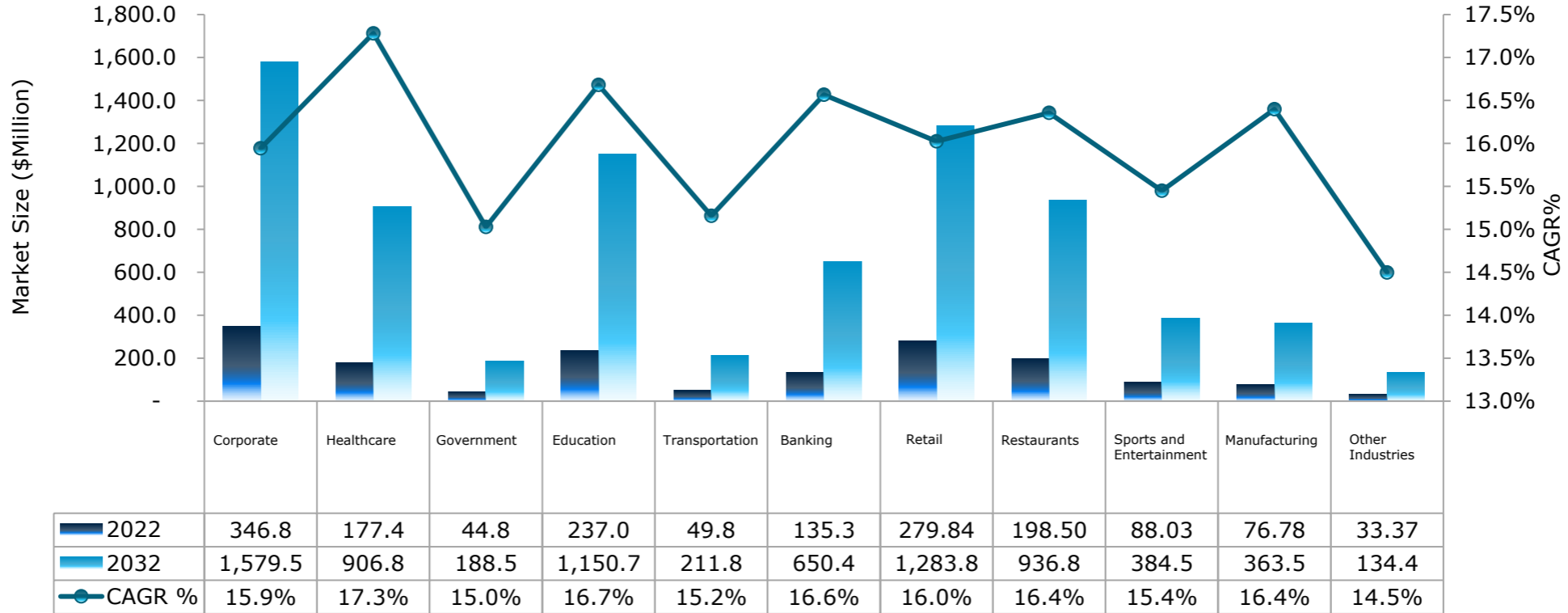|	Corporate	Healthcare	Government	Education	Transportation	Banking	Retail	Restaurants	Sports and Entertainment	Manufacturing	Other Industries
2022	346.8	177.4	44.8	237.0	49.8	135.3	279.84	198.50	88.03	76.78	33.37
2032	1,579.5	906.8	188.5	1,150.7	211.8	650.4	1,283.8	936.8	384.5	363.5	134.4
CAGR %	15.9%	17.3%	15.0%	16.7%	15.2%	16.6%	16.0%	16.4%	15.4%	16.4%	14.5%

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

Major companies in the market include –

- Scala
- Appspace Inc.
- Poppulo
- Hughes Network Systems, LLC
- Mvix Inc.
- Navori Labs
- Visix, Inc
- 22Miles Inc.
- Carousel
- Tripleplay
- NoviSign Digital Signage Inc
- Korbyt
- Skykit
- Signagelive

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	Service Type	Pricing Model	Organization Size	Industry Type	Region

• On-Premise
• Cloud-Based
	• License
	  • Player License
	  • Web content license
	• Maintenance Support
	• Professional Services
		• Perpetual License (On-Premise)
		• SaaS-Based
		  • Monthly Subscription
		  • Annual Subscription
			• Small and medium-sized enterprises (SMEs)
			• Large Enterprises
				• Corporate
				• Healthcare
				• Government
				• Education
				• Entertainment Venues
				• Transportation
				• Banking
				• Retail
				• Restaurants
				• Hospitality
				• Manufacturing
				• Other Industries
					• North America
					• Europe
					• Asia-Pacific

3.2.   INDUSTRIAL OUTLOOK

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. Digital signage solutions are becoming increasingly popular in several industries, including healthcare, transportation, education, and hospitality. One of the key factors driving the digital signage software market's growth is the increasing demand for interactive and personalized digital experiences. Businesses are leveraging digital signage solutions to create customized content that engages their customers and improves their overall experience. The ability to deliver dynamic, personalized content is critical to meeting the needs and expectations of today's tech-savvy consumers. As a result, businesses are investing in digital signage solutions that provide advanced analytics and content management capabilities to deliver personalized and engaging content.

Another key driver of the digital signage software market's growth is the increasing adoption of mobile devices and the Internet of Things (IoT). The integration of digital signage solutions with mobile devices and IoT devices 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. In addition, AI enables digital signage to gather real-time data and analyze audience demographics, behavior, and preferences. Facial recognition and computer vision technologies can anonymously capture audience characteristics, such as age, gender, and emotions. This data helps optimize content delivery and personalize messages to specific audience segments.

Rapid adoption of Artificial Intelligence (AI) in the context of digital signage has transformed the way content is created, personalized, and delivered to audiences. AI-powered tools can automatically generate content for digital signage displays. For instance, AI algorithms can curate and assemble relevant images, videos, and text based on predefined criteria or user preferences. This automation saves time and effort in content creation, especially for large-scale deployments.

Increasing demand for refreshing signage solutions is expected to boost the growth of this market in the coming years. Refreshing signage is one of the most popular ways to keep it consistent with a larger rebranding initiative. By upgrading to digital signage, businesses update their identity or possibly craft and convey messages to their clients more swiftly. According to research, 68% of consumers said that digital signage increases their propensity to buy the promoted goods. According to additional research, retail establishments who switched from traditional printed signs to digital signage had a 33 percent rise in sales. Interactive digital signage technology includes various features in addition to content presentation. Examples include built-in games, touchscreen kiosks, and tabletop ordering. However, comparable technologies have benefited other businesses. Direct marketing and retail are two of them. Customers have expressed satisfaction with the performance of the digital signage software. Multi-channel interaction is expected to have a big role in the future of digital signage, helping to make significant improvements to media devices by enabling access to numerous of these functionalities through software updates, sensors, and mobile apps.

Since 80% of learning is still visual, digital signage has the greatest potential to become one of the most effective marketing tools in the future. This marketing strategy has been adopted by businesses all over the world who want to establish long-lasting connections and surpass their rivals. Organizations enhance customer communication and up to four times increase employee engagement with digital signage. Digital signage is actually essential for a modern workforce. It is essential for promoting the organization's ideals and emphasizing volunteerism, charity giving, and sustainability projects. Additionally, to opening up new business options, this prospective marketing strategy raises consumer brand awareness by 47.7%, improves operational effectiveness, grabs the attention of 76% of onlookers, increases product sales by 33%, and boosts customer happiness by 46%. Statistics show that 59% of viewers of digital signage content are interested in learning more about the product or topic. Research also revealed that 70% of Americans claim to have seen a digital billboard or other type of digital signage. Similar to this, 68% of Americans have purchased a good or service after being drawn to its signage. More than 60% of customers make purchases at the point of sale, and buyers spend 30% more time browsing merchandise in stores that have digital signage installed. These choices are frequently influenced by digital signage technologies.

The corporate segment is emerging as a significant user of digital signage solutions. Digital signage in corporate environments has gained significant popularity and has become an essential tool for communication, engagement, and brand enhancement. Digital signage serves as an effective channel for internal communication within a corporate environment. It enables companies to share important announcements, news, company updates, and HR information in a visually engaging and easily accessible manner. It helps keep employees informed and connected, regardless of their location within the organization. Digital signage can be used to boost employee engagement and motivation by showcasing recognition programs, employee achievements, team goals, and success stories. It provides a platform to celebrate employee milestones, share positive messages, and foster a sense of belonging and pride.

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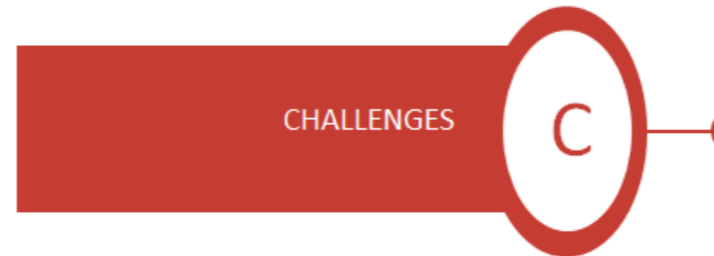
- High initial investment and installation costs
- Security and privacy concerns related to customer data
- Limited technical expertise and awareness among end-users
- Technical challenges related to software compatibility and integration with existing systems

- Integration of AI & ML

O OPPORTUNITIES

CHALLENGES **C**

- Concerns regarding implementation and proper maintenance

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

3.3.2.   MARKET RESTRAINT ANALYSIS

RESTRAINTS	IMPACT
• High initial investment and installation costs	MEDIUM (LOW — HIGH)
• Security and privacy concerns related to customer data.	MEDIUM (LOW — HIGH)
• Limited technical expertise and awareness among end-users	MEDIUM (LOW — HIGH)
• Technical challenges related to software compatibility and integration with existing systems.	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

system. The monthly maintenance fee could be between USD 59 and USD 500. Therefore, while choosing a digital signage solution, take into account company's capacity to bear maintenance costs. Furthermore, these prices change based on the kind of digital signage system. For instance, since they require fewer onsite maintenance visits, cloud-based digital signage systems have cheaper maintenance expenses. Standalone digital signage systems, on the other hand, need periodic maintenance, which can be more expensive.

3.3.4.   MARKET OPPORTUNITY ANALYSIS
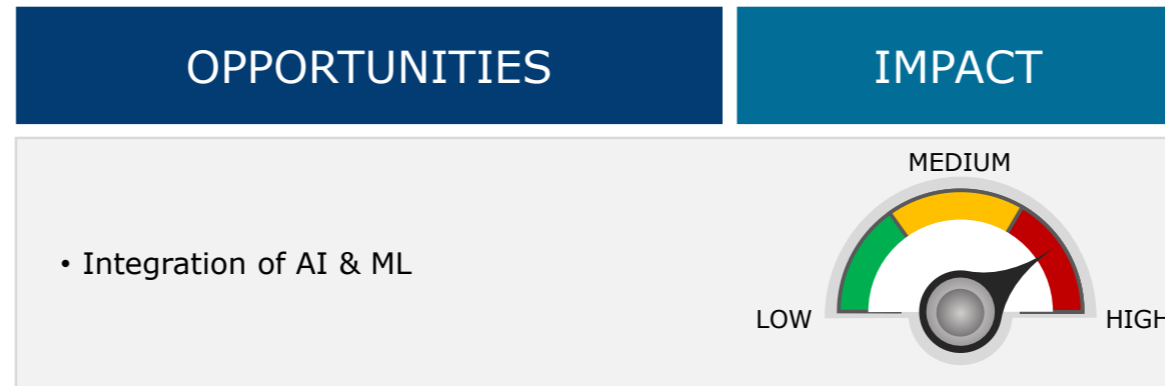
OPPORTUNITIES	IMPACT
• Integration of AI & ML	

3.3.4.1.   INTEGRATION OF AI & ML

Digital signage is changing due to AI, which is also giving its customers greater and newer chances. Retailers may have a clearer grasp of who their consumers are by utilizing next-generation digital signage solutions with features like facial recognition. Since face recognition raises its fair share of privacy issues, the information obtained can have an impact on business plans or the routes a company may take to satisfy its clientele. Additionally, the gathered data can be used by digital signage in real-time. AI in digital signs can identify a customer and greet them. In addition, it can provide special offers and discounts on products based on the user's past

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. 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 sensors can detect Several 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 delivers 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 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 hand movements. 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

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4.3.   DIGITAL SIGNAGE SOFTWARE MARKET- KEY DEVELOPMENTS

TABLE 3.   KEY DEVELOPMENTS

DATE	DESCRIPTION
February 2023	Longtime CMS software firm NoviSign has partnered with integrator ScreensTV and the retail media firm Heidia on ReaLo. The three founding companies bring unique levels of knowledge and disciplines enabling retailers of any size to provide digitization and dynamic visualization solutions for improved and effective shopping experience for their clients.
December 2022	NoviSign collaborated with Vestel Visual Solutions. According to the collaboration the NoviSign Digital Signage App is now available for all Vestel Commercial Grade Digital Signage Displays. NoviSigns' cloud-based digital signage software can produce and manage the content displayed on Vestel's Digital Signage displays. From simple slideshows with scrolling tickers to multi-location corporate communications, NoviSign can be used to set up engaging and dynamic content, schedule media times to play, and remotely monitor the Vestel's screens.
June 2023	22Miles, a leading digital signage and visual communications system content management system (CMS) provider, had a unique giveaway at their InfoComm booth: a conversational AI version of the tradeshow app, powered by ChatGPT. 22Miles used publicly available event information and ChatGPT integration to create a custom conversational interface capable of answering questions about the event and guiding attendees to booths, meeting rooms, sessions, and special events.

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

KEY TRENDS & HIGHLIGHTS

■ The demand of cloud-based CMS segment accounted for over 612.4 million in 2022 and is expected to grow at a rate of 21.5% in the forecast period.

5.1. CMS TYPE DYNAMICS & MARKET SHARE, 2022 & 2032

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 Millions USD)
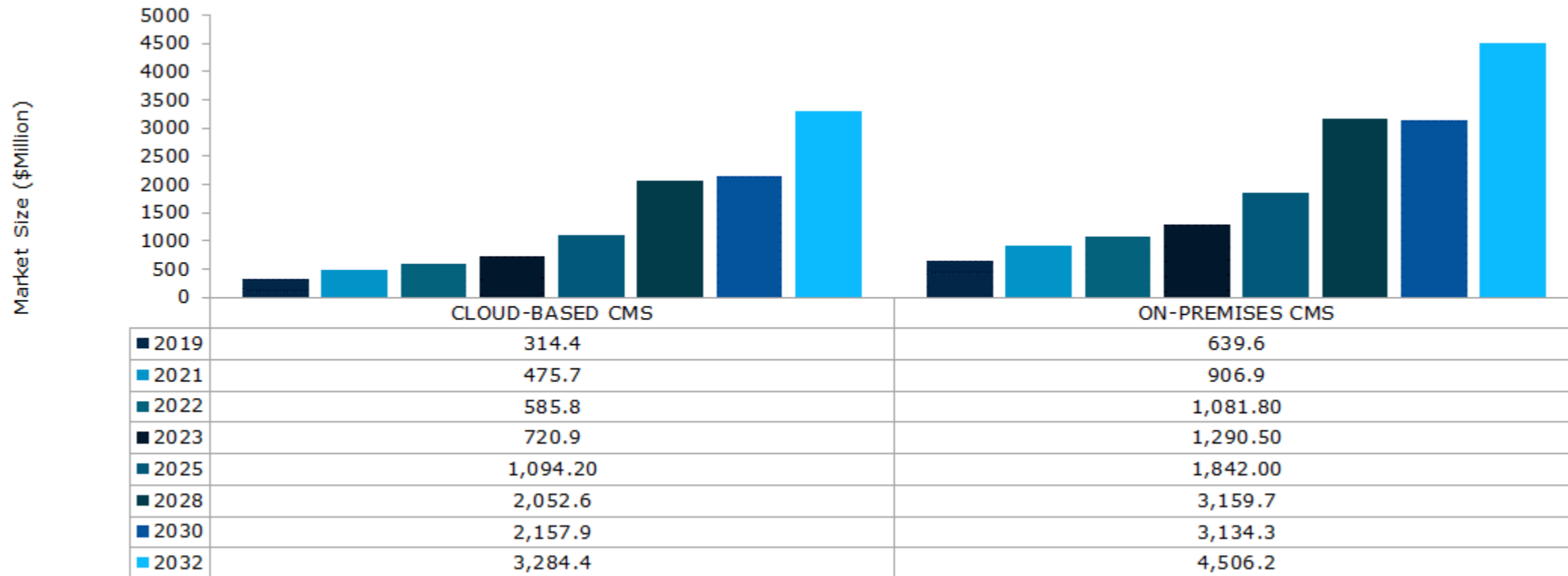
	CLOUD-BASED CMS	ON-PREMISES CMS
2019	314.4	639.6
2021	475.7	906.9
2022	585.8	1,081.80
2023	720.9	1,290.50
2025	1,094.20	1,842.00
2028	2,052.6	3,159.7
2030	2,157.9	3,134.3
2032	3,284.4	4,506.2

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

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. Companies are also making significant investments, working on product launches, and making innovations in existing product lines which is also contributing to the revenue growth of this segment. For instance, on 18 January 2022, Mvix recently introduced Mvix CMS, their latest cloud-based software that is revolutionizing the digital signage sector. This innovative software places emphasis on monitoring device health and ensuring system security. It offers advanced features such as comprehensive device monitoring, a redesigned user interface available in over 40 languages, seamless integration with third-party systems, and an all-inclusive scheduling interface.

5.2.1. DIGITAL SIGNAGE SOFTWARE MARKET BY CLOUD-BASED CMS, ESTIMATES AND FORECASTS, 2019-2032, (Millions USD)

TABLE 4. DIGITAL SIGNAGE SOFTWARE MARKET BY CLOUD-BASED, ESTIMATES AND FORECASTS, 2019-2032, (Millions USD)

Market Size	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
Revenue (Millions USD)	314.4	387.1	475.7	585.8	720.9	888.0	1,094.2	1,663.6	2,052.6	2,157.9	2,661.4	3,284.4	24.0%

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

5.2.2. DIGITAL SIGNAGE SOFTWARE MARKET BY CLOUD-BASED, ESTIMATES AND FORECASTS, BY REGION, 2019-2032, (Millions USD)

TABLE 5. DIGITAL SIGNAGE SOFTWARE MARKET BY CLOUD-BASED, ESTIMATES AND FORECASTS, BY REGION, 2019-2032, (Millions USD)

Region	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
North America	116.7	142.7	174.0	212.7	259.4	316.9	387.3	579.0	708.4	732.1	895.3	1,095.3	22.7%
Europe	89.6	111.0	137.1	169.7	210.4	260.6	323.1	496.9	616.6	655.5	812.9	1,008.7	25.0%
Asia Pacific	108.2	133.4	164.6	203.4	251.2	310.5	383.9	587.7	727.7	770.3	953.3	1,180.4	24.6%
Total	314.4	387.1	475.7	585.8	720.9	888.0	1,094.2	1,663.6	2,052.6	2,157.9	2,661.4	3,284.4	24.0%

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

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, 2019-2032, (Millions USD)

TABLE 6. DIGITAL SIGNAGE SOFTWARE MARKET BY ON-PREMISES CMS, ESTIMATES AND FORECASTS, 2019-2032, (Millions USD)

Market Size	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
Revenue (Millions USD)	639.6	762.1	906.9	1,081.8	1,290.5	1,541.2	1,842.0	2,637.5	3,159.7	3,134.3	3,756.9	4,506.2	19.5%

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.

DIGITAL SIGNAGE SOFTWARE MARKET BY
SERVICE TYPE INSIGHTS & TREND

KEY TRENDS & HIGHLIGHTS

- The demand of professional services segment accounted for over 235.6 million in 2022 and is expected to grow at a rate of 17.3% in the forecast period.

6.1. SERVICE TYPE DYNAMICS & MARKET SHARE, 2022 & 2032

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 Millions USD)

	License	MAINTENANCE AND SUPPORT	PROFESSIONAL SERVICES
■2019	459.8	363.1	131.0
■2021	671.5	517.3	193.8
■2022	813.3	618.7	235.6
■2023	984.5	739.6	287.2
■2025	1,448.1	1,061.1	427.0
■2028	2,599.2	1,834.2	778.9
■2030	2,658.3	1,829.2	804.7
■2032	3,941.2	2,644.7	1,204.8

■2019 ■2021 ■2022 ■2023 ■2025 ■2028 ■2030 ■2032

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 license 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.

7. DIGITAL SIGNAGE SOFTWARE MARKET BY PRICING MODEL INSIGHTS & TREND
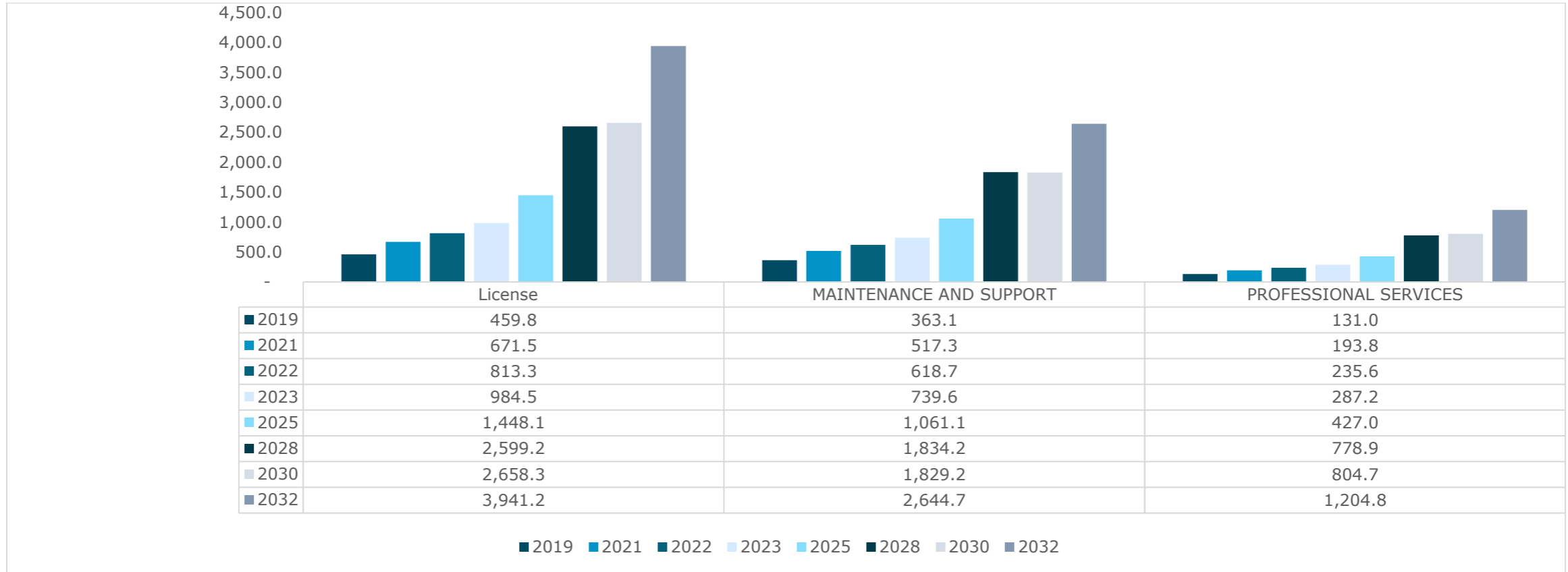
KEY TRENDS & HIGHLIGHTS

- The demand of perpetual (on-premises) segment accounted for over 1,154.4 million in 2022 and is expected to grow at a rate of 16.4% in the forecast period.

7.1. PRICING MODEL DYNAMICS & MARKET SHARE, 2022 & 2032

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 Millions USD)
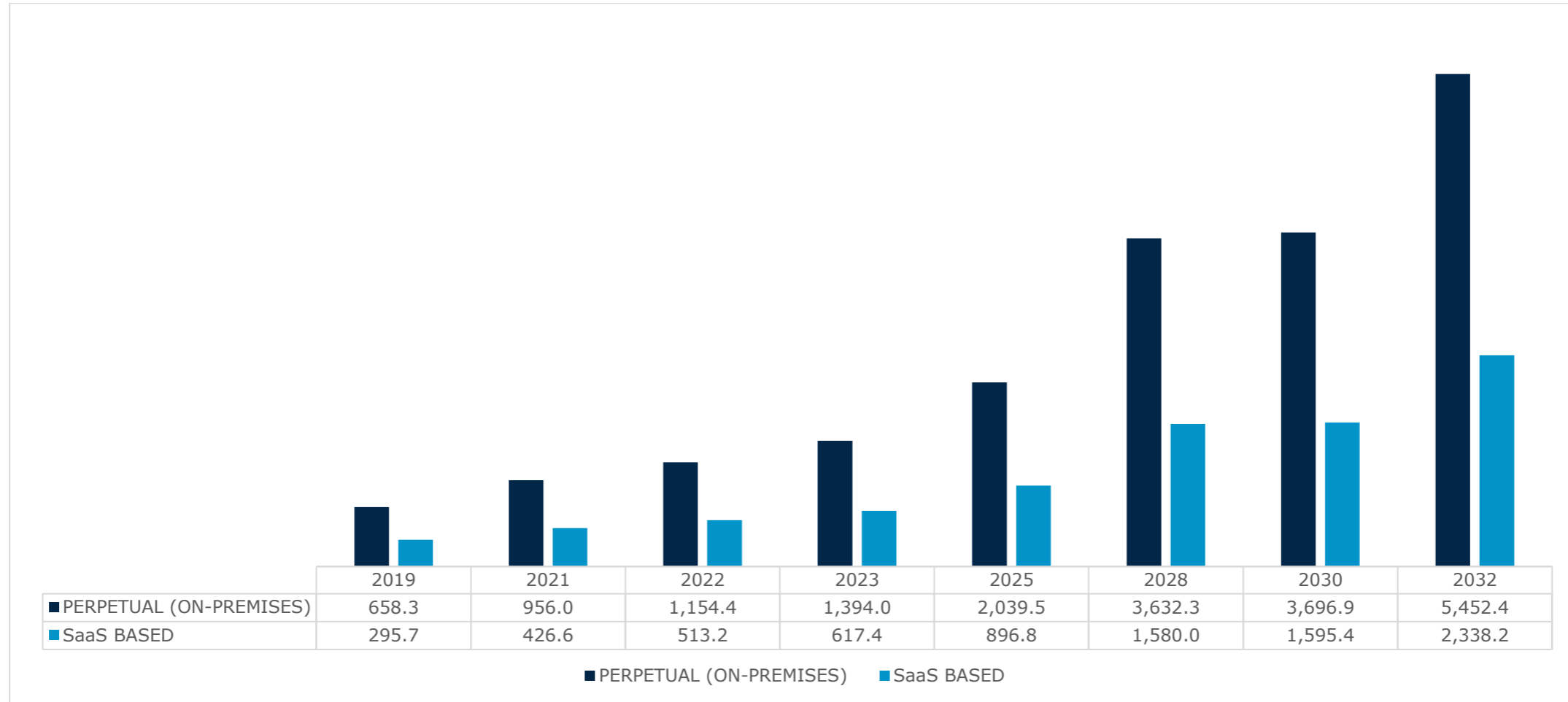
	2019	2021	2022	2023	2025	2028	2030	2032
PERPETUAL (ON-PREMISES)	658.3	956.0	1,154.4	1,394.0	2,039.5	3,632.3	3,696.9	5,452.4
SaaS BASED	295.7	426.6	513.2	617.4	896.8	1,580.0	1,595.4	2,338.2

■ 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, 2019-2032, (Millions USD)

TABLE 18. DIGITAL SIGNAGE SOFTWARE MARKET BY PERPETUAL (ON-PREMISES), ESTIMATES AND FORECASTS, 2019-2032, (Millions USD)

Market Size	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
Revenue (Millions USD	658.3	793.8	956.0	1,154.4	1,394.0	1,685.2	2,039.5	2,994.0	3,632.3	3,696.9	4,487.2	5,452.4	16.4%

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

7.2.2. DIGITAL SIGNAGE SOFTWARE MARKET BY PERPETUAL (ON-PREMISES), ESTIMATES AND FORECASTS, BY REGION, 2019-2032, (Millions USD)

TABLE 19. DIGITAL SIGNAGE SOFTWARE MARKET BY PERPETUAL (ON-PREMISES), ESTIMATES AND FORECASTS, BY REGION, 2019-2032, (Millions USD)

Region	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
North America	273.7	326.3	388.4	464.0	553.0	660.7	790.1	1,132.8	1,358.2	1,350.8	1,619.8	1,945.4	15.0%
Europe	178.8	218.1	265.5	323.5	395.3	482.6	590.0	882.8	1,080.9	1,119.5	1,370.9	1,679.8	17.4%
Asia Pacific	205.7	249.4	302.1	366.9	445.6	541.8	659.3	978.4	1,193.2	1,226.5	1,496.4	1,827.2	17.0%
Total	658.3	793.8	956.0	1,154.4	1,394.0	1,685.2	2,039.5	2,994.0	3,632.3	3,696.9	4,487.2	5,452.4	16.4%

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

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 431.8 million in 2022 and is expected to grow at a rate of 16.5% in the forecast period.

8.1. ORGANIZATION SIZE DYNAMICS & MARKET SHARE, 2022 & 2032

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)
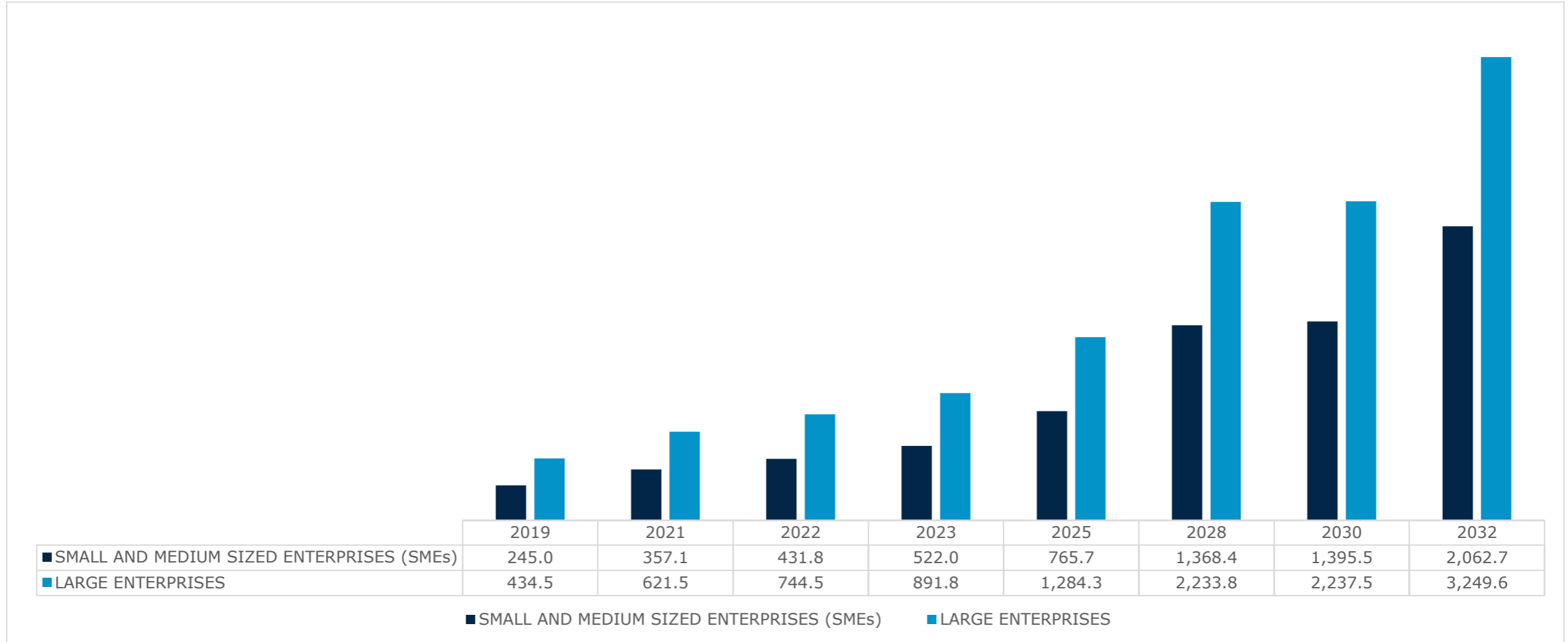
	2019	2021	2022	2023	2025	2028	2030	2032
■ SMALL AND MEDIUM SIZED ENTERPRISES (SMEs)	245.0	357.1	431.8	522.0	765.7	1,368.4	1,395.5	2,062.7
■ LARGE ENTERPRISES	434.5	621.5	744.5	891.8	1,284.3	2,233.8	2,237.5	3,249.6

■ SMALL AND MEDIUM SIZED ENTERPRISES (SMEs) ■ LARGE ENTERPRISES

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, 2019-2032, (Millions USD)

TABLE 26. DIGITAL SIGNAGE SOFTWARE MARKET BY SMALL AND MEDIUM SIZED ENTERPRISES, ESTIMATES AND FORECASTS, 2019-2032, (Millions USD)

Market Size	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
Revenue (Millions USD)	245.0	296.1	357.1	431.8	522.0	632.0	765.7	1,126.7	1,368.4	1,395.5	1,695.9	2,062.7	16.5%

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

8.2.2. DIGITAL SIGNAGE SOFTWARE MARKET BY SMALL AND MEDIUM SIZED ENTERPRISES, ESTIMATES AND FORECASTS, BY REGION, 2019-2032, (Millions USD)

TABLE 27. DIGITAL SIGNAGE SOFTWARE MARKET BY SMALL AND MEDIUM SIZED ENTERPRISES, ESTIMATES AND FORECASTS, BY REGION, 2019-2032, (Millions USD)

Region	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
North America	141.6	169.8	203.2	244.0	292.4	351.2	422.2	611.8	737.3	740.3	892.9	1,077.8	15.6%
Europe	95.4	116.8	142.6	174.5	213.9	262.1	321.4	484.0	594.7	620.1	761.8	936.5	17.8%
Asia Pacific	8.0	9.5	11.2	13.3	15.7	18.6	22.1	30.9	36.5	35.0	41.2	48.5	13.3%
Total	245.0	296.1	357.1	431.8	522.0	632.0	765.7	1,126.7	1,368.4	1,395.5	1,695.9	2,062.7	16.5%

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

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, 2019-2032, (Millions USD)

TABLE 28. DIGITAL SIGNAGE SOFTWARE MARKET BY LARGE ENTERPRISES, ESTIMATES AND FORECASTS, 2019-2032, (Millions USD)

Market Size	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
Revenue (Millions USD)	434.5	520.1	621.5	744.5	891.8	1,069.8	1,284.3	1,855.9	2,233.8	2,237.5	2,695.3	3,249.6	15.4%

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

8.3.2. DIGITAL SIGNAGE SOFTWARE MARKET BY LARGE ENTERPRISES, ESTIMATES AND FORECASTS, BY REGION, 2019-2032, (Millions USD)

TABLE 29. DIGITAL SIGNAGE SOFTWARE MARKET BY LARGE ENTERPRISES, ESTIMATES AND FORECASTS, BY REGION, 2019-2032, (Millions USD)

Region	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
North America	257.0	304.9	361.2	429.2	509.0	605.0	719.7	1,021.2	1,218.0	1,197.9	1,429.8	1,708.0	14.4%
Europe	163.0	198.2	240.4	291.9	355.6	432.8	527.1	783.3	955.7	983.1	1,199.8	1,465.1	17.0%
Asia Pacific	14.5	17.0	19.9	23.3	27.3	32.0	37.5	51.4	60.0	56.5	65.8	76.5	12.1%
Total	434.5	520.1	621.5	744.5	891.8	1,069.8	1,284.3	1,855.9	2,233.8	2,237.5	2,695.3	3,249.6	15.4%

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

9. DIGITAL SIGNAGE SOFTWARE MARKET BY INDUSTRY TYPE INSIGHTS & TREND

KEY TRENDS & HIGHLIGHTS

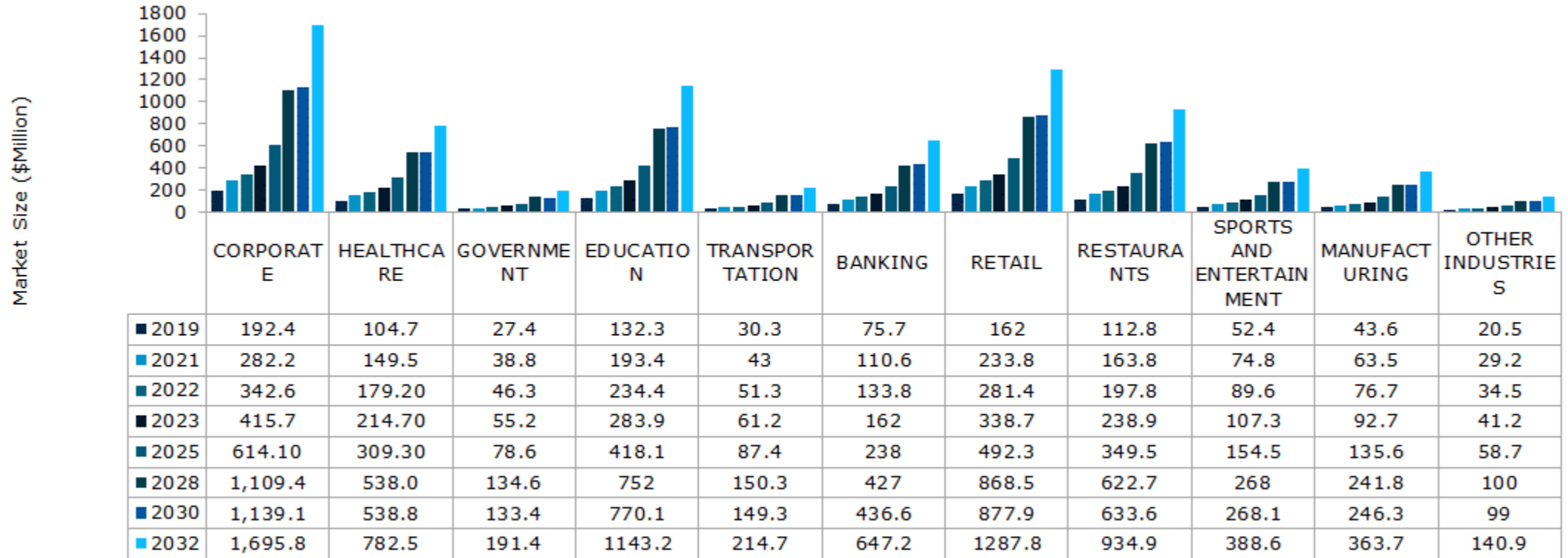- The demand of healthcare segment accounted for over 177.4 million in 2022 and is expected to grow at a rate of 17.3% in the forecast period.

9.1. INDUSTRY TYPE DYNAMICS & MARKET SHARE, 2022 & 2032

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 Millions USD)

	CORPORATE	HEALTHCARE	GOVERNMENT	EDUCATION	TRANSPORTATION	BANKING	RETAIL	RESTAURANTS	SPORTS AND ENTERTAINMENT	MANUFACTURING	OTHER INDUSTRIES
2019	192.4	104.7	27.4	132.3	30.3	75.7	162	112.8	52.4	43.6	20.5
2021	282.2	149.5	38.8	193.4	43	110.6	233.8	163.8	74.8	63.5	29.2
2022	342.6	179.20	46.3	234.4	51.3	133.8	281.4	197.8	89.6	76.7	34.5
2023	415.7	214.70	55.2	283.9	61.2	162	338.7	238.9	107.3	92.7	41.2
2025	614.10	309.30	78.6	418.1	87.4	238	492.3	349.5	154.5	135.6	58.7
2028	1,109.4	538.0	134.6	752	150.3	427	868.5	622.7	268	241.8	100
2030	1,139.1	538.8	133.4	770.1	149.3	436.6	877.9	633.6	268.1	246.3	99
2032	1,695.8	782.5	191.4	1143.2	214.7	647.2	1287.8	934.9	388.6	363.7	140.9

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

9.2. CORPORATE

Corporate environments often have a large number of employees and multiple departments or teams. Digital signage provides a visually engaging and effective way to communicate important messages, company news, updates, and announcements to employees. It can be used to promote corporate culture, share goals and objectives, recognize employee achievements, and reinforce core values. Many

corporate offices or campuses are large and complex, making it challenging for visitors and employees to find their way around. Digital signage can serve as wayfinding tools, providing interactive maps, directional information, and navigation assistance. This helps individuals locate meeting rooms, departments, amenities, and other important areas within the corporate premises. Digital signage allows corporations to showcase engaging and interactive content that captures employees' attention and encourages their involvement. It can display employee-focused information such as upcoming events, training programs, wellness initiatives, employee recognition, and internal social media feeds, fostering a sense of community and connection within the organization. Digital signage also enables corporations to reinforce their brand identity and promote their products or services. It can display visually appealing content, advertisements, promotional videos, and product showcases to capture the attention of employees and visitors. Digital signage can also be used to highlight corporate achievements, customer testimonials, or industry awards, enhancing the organization's reputation and credibility. Digital signage can be integrated with scheduling systems to provide real-time information about meeting room availability, upcoming meetings, and event schedules. This streamlines the process of booking and managing meeting rooms, reducing confusion and improving efficiency in corporate settings. In emergency situations or critical incidents, digital signage can be used to display emergency alerts, evacuation instructions, or important safety information. It provides a reliable and visible channel to communicate essential messages quickly and effectively to all employees within the corporate environment.
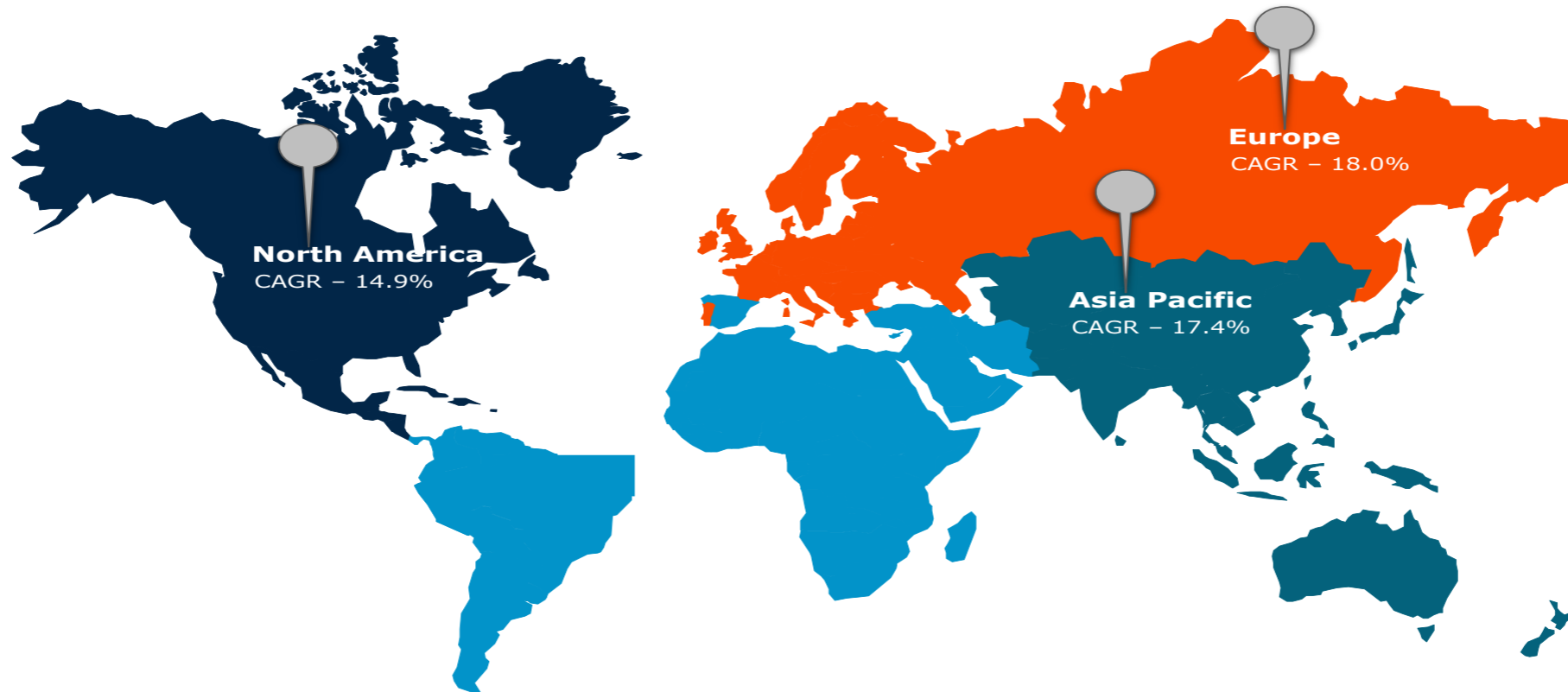
10. DIGITAL SIGNAGE SOFTWARE MARKET BY REGIONAL INSIGHTS & TRENDS

KEY REGIONAL TRENDS & HIGHLIGHTS

■ Europe is expected to account for a share of 18.0% in the Digital Signage Software Market market in 2032.
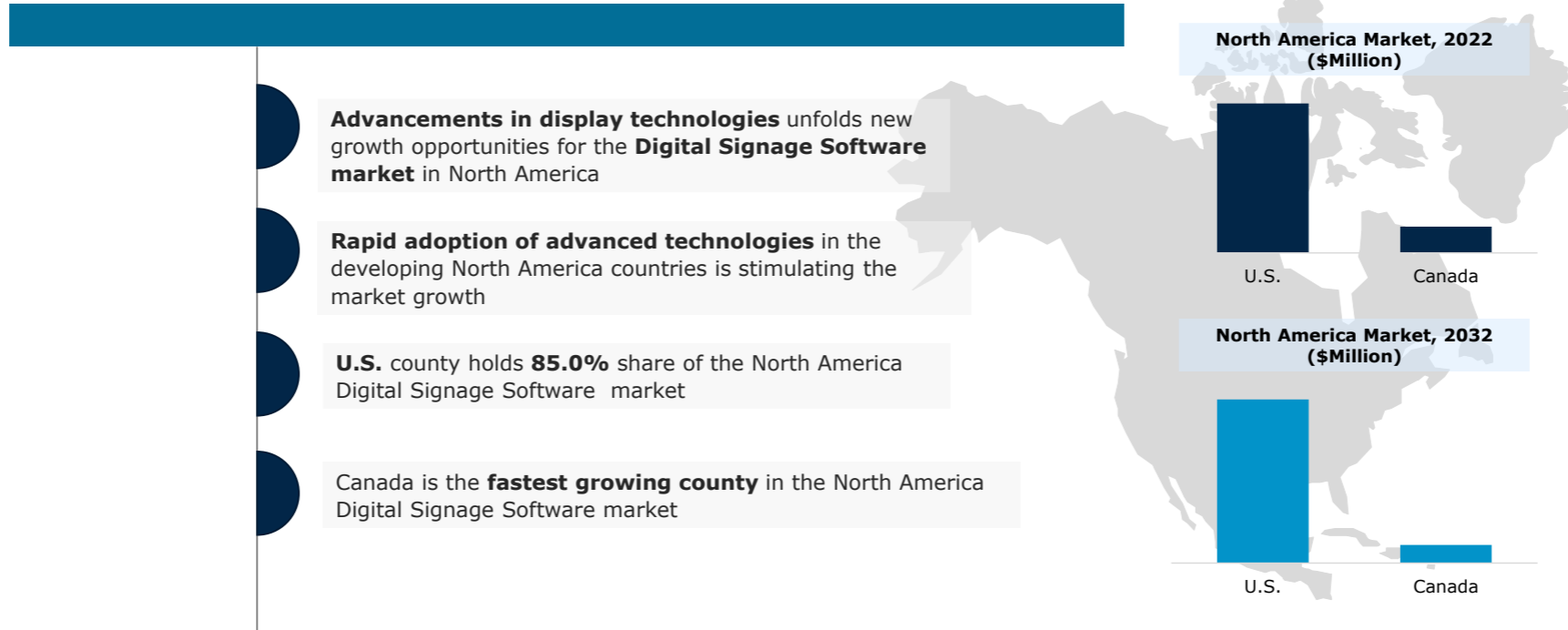
10.1. REGIONAL DYNAMICS & MARKET SHARE, 2022 - 2032

North America
CAGR – 14.9%

Europe
CAGR – 18.0%

Asia Pacific
CAGR – 17.4%

10.2. NORTH AMERICA

Digital Signage Software Market Regional Snapshot 2022
North America

EMERGEN
R E S E A R C H

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

Canada is the **fastest growing county** in the North America Digital Signage Software market

North America Market, 2022 ($Million)

U.S.   Canada

North America Market, 2032 ($Million)

U.S.   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 institutions 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 signs makes it possible to tailor advertising and customize communications. Furthermore, rising technological innovations and development by various manufacturers in this region are 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.

10.2.1. NORTH AMERICAN DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECAST, 2019-2032 (Millions USD)

TABLE 52. NORTH AMERICA DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECASTS, 2019-2032, (Millions USD)

Market Size	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
Revenue (Millions USD)	398.6	474.8	564.4	673.2	801.4	956.2	1,142.0	1,633.0	1,955.3	1,938.2	2,322.7	2,785.8	14.8%

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

10.2.2. NORTH AMERICAN DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECAST, BY COUNTRY, 2019-2032 (Millions USD)

TABLE 53. NORTH AMERICA DIGITAL SIGNAGE SOFTWARE MARKET REVENUE ESTIMATES AND FORECAST, BY COUNTRY, 2019-2032 (Millions USD)

Region	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
U.S.	332.8	398.8	476.9	572.2	685.2	822.3	987.8	1,428.8	1,720.6	1,725.0	2,078.8	2,507.2	15.5%
Canada	65.8	76.0	87.5	101.0	116.2	133.9	154.2	204.1	234.6	213.2	243.9	278.6	10.2%
Total	398.6	474.8	564.4	673.2	801.4	956.2	1,142.0	1,633.0	1,955.3	1,938.2	2,322.7	2,785.8	14.8%

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

10.2.3. NORTH AMERICAN DIGITAL SIGNAGE SOFTWARE MARKET ESTIMATES AND FORECAST, BY CMS TYPE, 2019-2032 (Millions USD)

TABLE 54. NORTH AMERICA DIGITAL SIGNAGE SOFTWARE MARKET REVENUE ESTIMATES AND FORECAST, BY CMS TYPE, 2019-2032 (Millions USD)

CMS TYPE	2019	2020	2021	2022	2023	2024	2025	2027	2028	2030	2031	2032	CAGR (2023-32)
Cloud-Based Cms	116.7	142.7	174.0	212.7	259.4	316.9	387.3	579.0	708.4	732.1	895.3	1,095.3	17.4%
On-Premises Cms	281.9	332.1	390.4	460.5	542.0	639.3	754.7	1,054.0	1,246.9	1,206.1	1,427.4	1,690.5	13.5%
Total	398.6	474.8	564.4	673.2	801.4	956.2	1,142.0	1,633.0	1,955.3	1,938.2	2,322.7	2,785.8	14.8%

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

11. COMPETITIVE LANDSCAPE

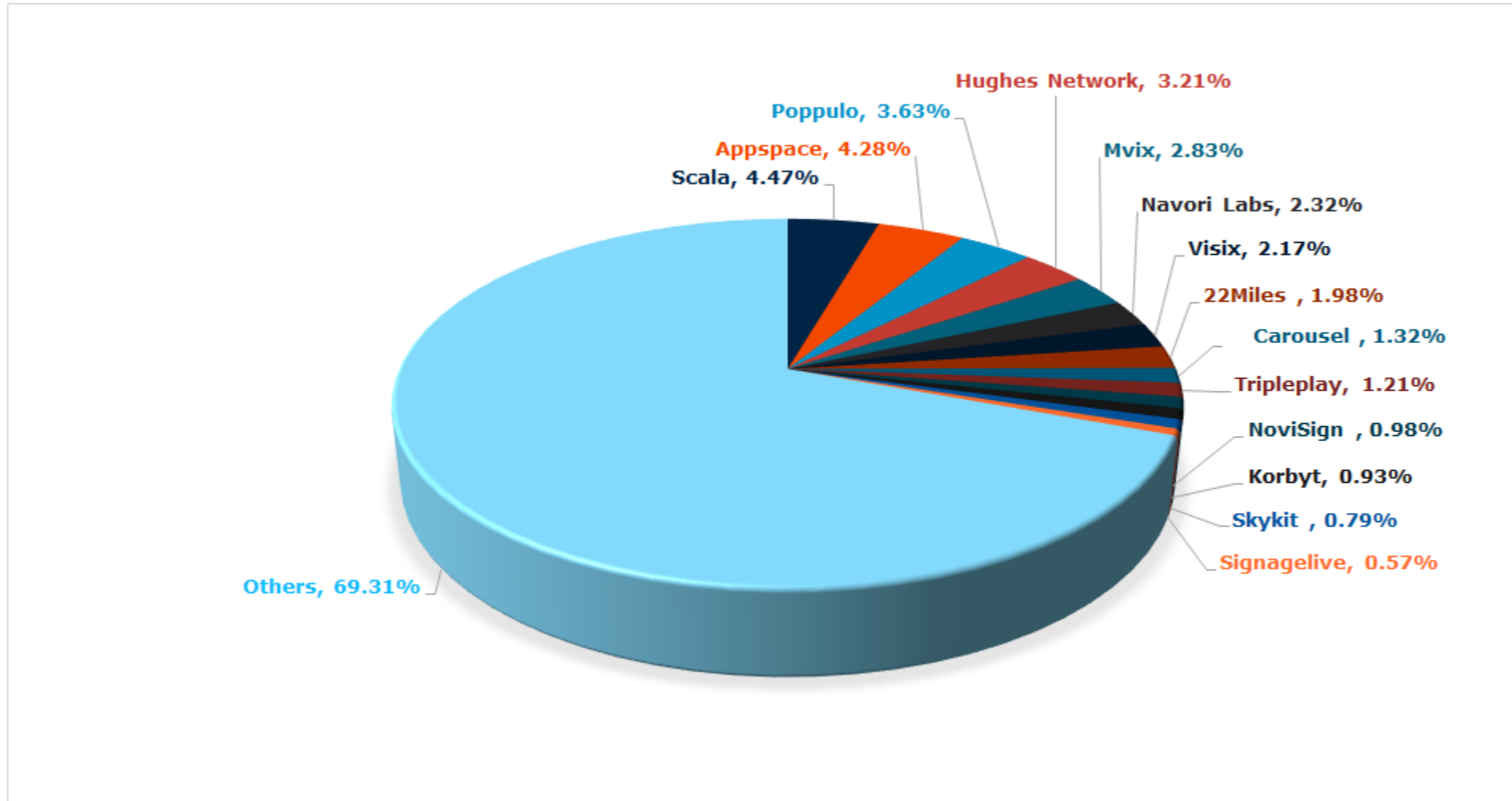# 11.1. DIGITAL SIGNAGE SOFTWARE MARKET: COMPANY MARKET SHARE ANALYSIS

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 18.42% of the market, as of 2022. Scala dominated the market with 4.47% of market share, followed by, Appspace Inc., Poppulo, Mvix Inc., and Hughes Network Systems, LLC., with 4.28%, 3.63%, 3.21% and 2.83% market shares respectively.

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

Company	Market Share
Scala	4.47%
Appspace	4.28%
Hughes Network	3.63%
Mvix	3.21%
Poppulo	2.83%
Navori Labs	2.32%
Visix	2.17%
22Miles	1.98%
Carousel	1.32%
Tripleplay	1.21%
NoviSign	0.98%
Korbyt	0.93%
Skykit	0.79%
Signagelive	0.57%
Others	69.31%

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

FIGURE 17. DIGITAL SIGNAGE SOFTWARE MARKET: MARKET SHARE ANALYSIS

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

11.2. DIGITAL SIGNAGE SOFTWARE MARKET: COMPANY SNAPSHOT

Competition Landscape – Digital Signage Software Market					
Company Profile	**Scala**	**Appspace Inc.**	**Poppulo**	**Mvix Inc.**	**Hughes Network Systems, LLC**
Headquarter	Malvern, Pennsylvania, U.S.	Dallas, Texas, U.S.	Denver, Colorado, U.S.	Sterling, Virginia, U.S.	Germantown, Maryland, U.S.
Revenue (USD)	USD 65.0 Million	USD 55.5 Million	USD 23.0 Million	USD 29.5 Million	USD 31.2 Million
Product & Service	▪ Scala Digital Signage Software ▪ Activia	• Digital Signage Software	• Digital Signage Software	• Cloud Based Digital Signage Software	• Customer-Facing Digital Signage Solutions • Digital Menu Boards • CampusVision • Hughes MediaSignage platform
Market Presence	▪ North America ▪ Europe ▪ Asia	▪ North America ▪ Europe ▪ Asia	▪ North America ▪ Europe ▪ Asia	▪ North America ▪ Europe ▪ Asia	▪ North America ▪ Europe ▪ Asia
Market Strategy	**P** **N** **I**	**P**		**P** **N**	**P**

Collaboration & Partnerships **P** **New Product Launch** **N** **Investment & Expansion** **I** **Mergers & Acquisition** **M**
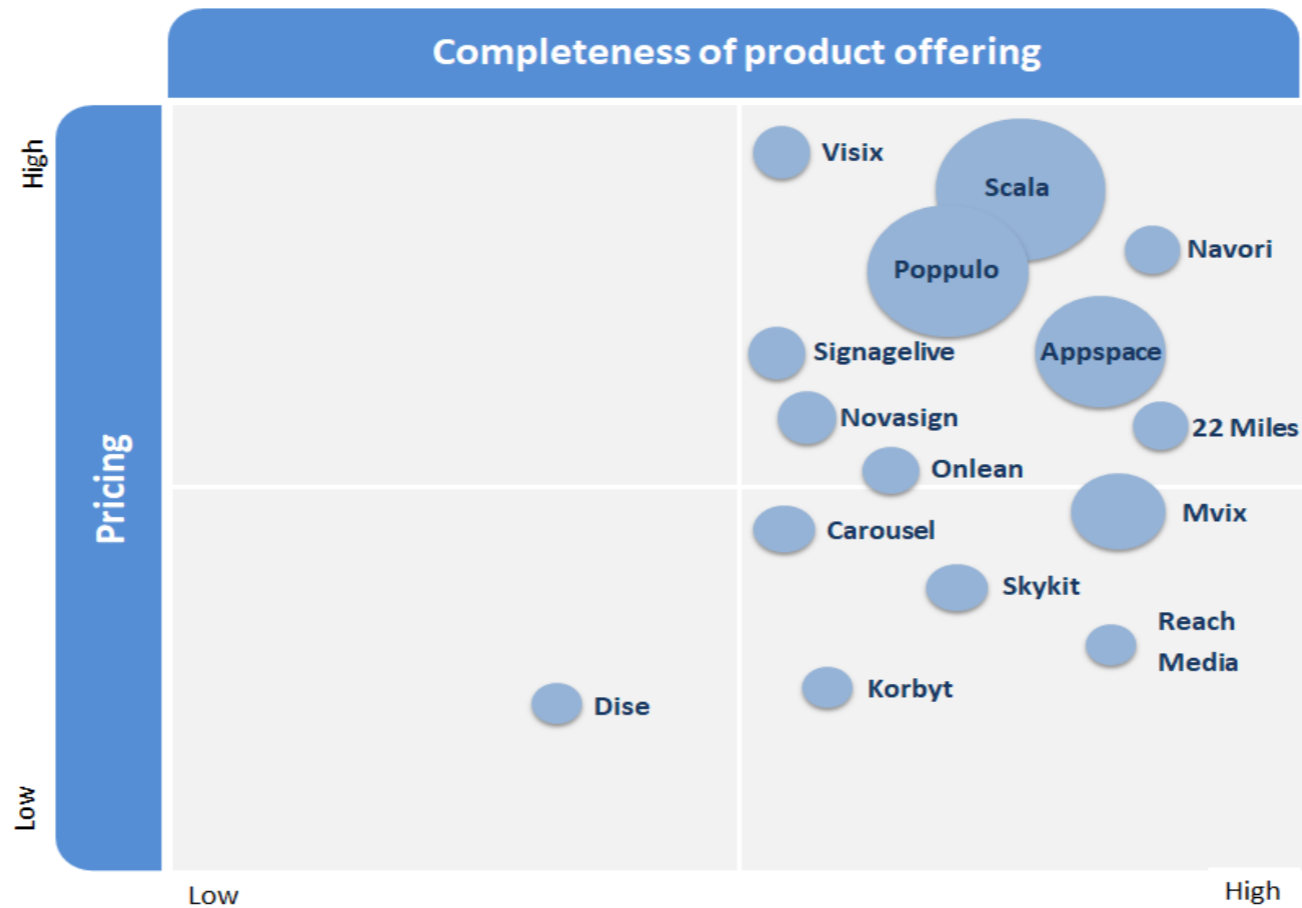
Source: Company Products and Strategy Analysis, Primary Research, Executive Interview, and Emergen Research Analysis

Key participants in the global Digital Signage Software Market are Scala, Appspace Inc., Poppulo, Hughes Network Systems, LLC, Mvix Inc., Navori Labs., Visix, Inc., 22Miles Inc., Tripleplay, NoviSign Digital Signage Inc., Korbyt, Signagelive, and others.

Players in the market are currently increasing efforts with regards to investment & expansion as companies focus on gaining a competitive edge over others in the market through ideas and resource sharing with respective counterparts. Companies are also deploying strategies such as new product launch and entering into agreements and partnerships, to form strategic alliances with crucial end-users or organizations in both the public and private sectors. This is helping them gain a competitive advantage in terms of sales, hence focusing on new product development.

11.3. COMPLETENESS OF PRODUCT OFFERINGS OF KEY DIGITAL SIGNAGE SOFTWARE PLAYER
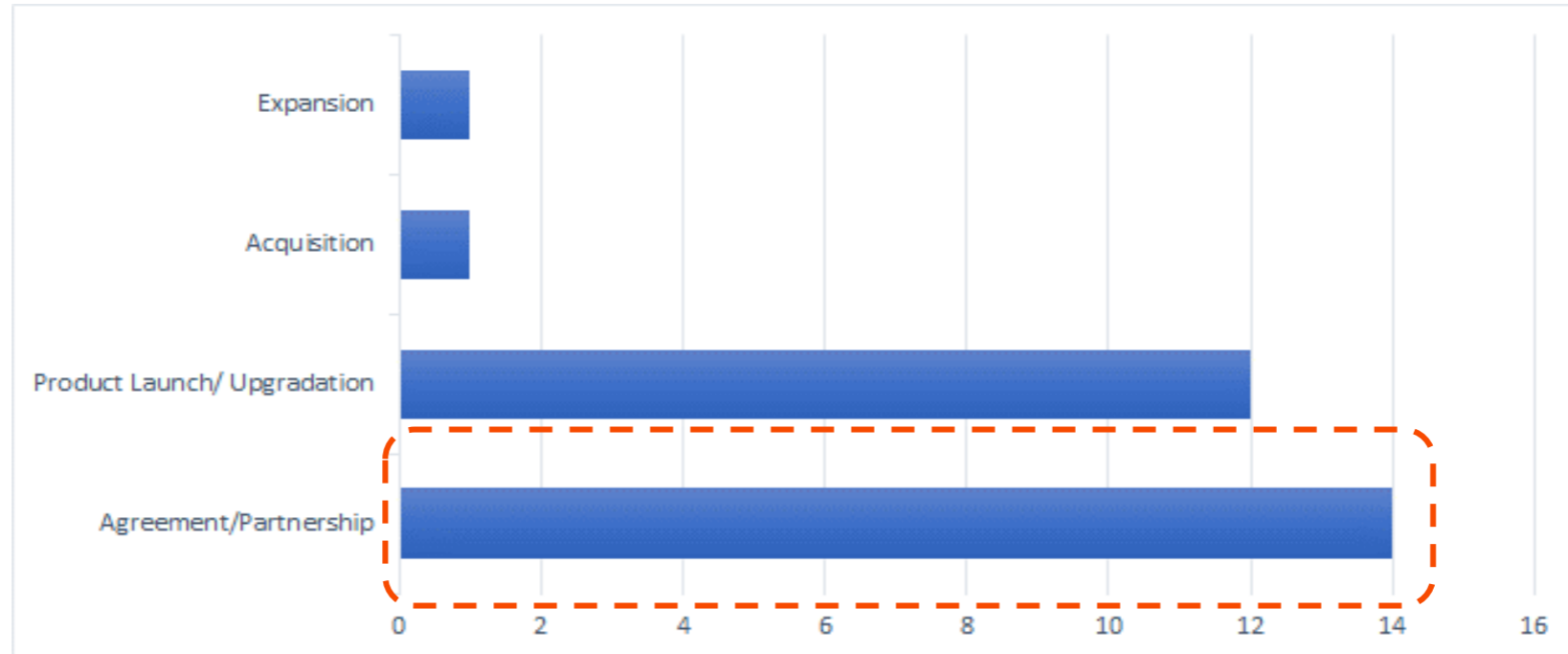
FIGURE 18. DIGITAL SIGNAGE SOFTWARE MARKET COMPLETENESS OF PRODUCT OFFERINGS OF KEY MARKET PLAYER, 2020-2023

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

11.4. STRATEGY BENCHMARKING

FIGURE 19. DIGITAL SIGNAGE SOFTWARE MARKET: STRATEGY MAPPING OF KEY PLAYERS, 2020-2023

Players in the Digital Signage Software market employed various strategies like partnership, product launch, agreement, acquisition, and expansion to increase their market share by reaching out to a newer portion of the potential consumer base as well as holding the current consumer base through various tactics. The players in the market also heavily ramped up their efforts for research and development to develop new products and thus make a unique offering in the market. Of all the strategies employed during the review period, partnership is one of the leading strategies followed by product launch.

TABLE 170.   AGGREEMENT, COLLABORATION & PARTNERSHIP IN DIGITAL SIGNAGE SOFTWARE MARKET, 2020-2023

DATE	COMPANY NAME	DESCRIPTION
02 March 2023	Navori Labs	GPA, the world's largest AV integrator, announced that Navori Labs has joined the GPA Global Partner Program. Offering a complete suite of digital signage capabilities for any application, hardware type, and hosting model, Navori is at the forefront of the market in terms of digital signage offerings.
07 February 2023	Appspace Inc.	Appspace partnered with Logitech for making digital signage easier than ever. Since the company welcomed Logitech as a partner in the Appspace Built-in program, they have been working together on integrations that make it easy for businesses to run the Appspace platform on Logitech devices. Now, they are expanding their partnership with new solutions to help unify the digital and physical workplace. Appspace Digital Signage will be available to Logitech customers using Logitech RoomMate or Tap Scheduler with an Appspace subscription, with easy connection to and management of Appspace channels.
03 January 2023	Appspace Inc.	University of Northampton partners with appspace to implement digital signage. Appspace helped UON to develop and deploy engaging digital signage content throughout its campus, making it a more modern and inviting environment for students and staff quickly and easily. Partnering with Appspace provided the expertise and tools to help implement advanced technology, such as the "Power Tower," a landmark feature for th campus and the community.
11 August 2022	Coates Group	Coates Group, a global technology company specializing in digital merchandising solutions, was named as McDonald's single global Digital Menu Board (DMB) Content Management System (CMS) provider and one of two approved Digital Menu Board hardware providers alongside Acrelec Group. While Coates Group has been providing solutions to McDonald's around the world for 50 years, this new appointment is the largest partnership engagement to date and follows an extensive, multiple-round RFP process in which several providers were evaluated.

06 June 2022	Navori Labs	Navori Labs, a pioneer in enterprise-level digital signage and marketing analytics software, has aligned with Sony Electronics as a flagship member of their AV Alliance Partner Network. Sony's AV Alliance Partner Network is powered by strategic alliances across the industry, offering compatible software and hardware solutions that bring additional value, creative freedom, and enhanced compatibility to their lineup of professional displays. This growing partner ecosystem, includes many of the leading solutions providers focused on digital signage, conference collaboration, and mounting.
15 March 2022	Mvix Inc.	Mvix, a leading provider of Pro-AV enterprise solutions, has completed Sony's Quality Assurance process to allow resellers and end-customers the ability to deploy integrated digital signage software solutions on Sony's BRAVIA Professional Android TV screens. Mutually supported by Sony and Mvix, the combined solutions can confidently be specified by resellers and Systems Integration partners to provide a seamless single device solution by allowing Mvix to operate directly on Sony's BRAVIA Pro System-on-a-Chip displays, powered by Android TV.
26 October 2021	Appspace Inc.	Poly, a global communications company that powers meaningful human connection and collaboration, announced the integration of Appspace, a leading provider of workplace experience software. Appspace allows Poly Video OS device users to enable modern team communications and digital signage to add value to meeting spaces of all sizes during downtime. The Appspace integration offers dynamic workplace communication opportunities for HR, corporate communications, marketing, and other teams as Appspace digital signage becomes available on all devices running Poly Video OS.
15 March 2021	Poppulo	Four Winds Interactive, the leading provider of enterprise digital signage and workplace experience software, and Poppulo, the leading provider of email and mobile employee communication software, announced the two companies have reached a definitive agreement to join together, forming a global employee communications leader for today's world of work. The combination is backed by Vista Equity Partners, a leading global investment firm focused on enterprise software, data, and technology-enabled businesses.

09 December 2020	Yodeck	Yodeck announced the partnership with Screenfeed, a content provider that specializes in digital signage. Screenfeed's features could prove extremely useful for many use cases. This service specializes in creating reliable and professional content feeds, such as news, sports, infotainment, airport flight boards and much more. The huge range of content feeds found on Screenfeed brings a whole new level of flexibility and creativity.

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

TABLE 171.   PRODUCT LAUNCH, UPGRADATION IN DIGITAL SIGNAGE SOFTWARE MARKET, 2020-2023

DATE	COMPANY NAME	DESCRIPTION
8 December 2022	Scala	Scala announced the release of its flagship digital signage platform, Scala Enterprise version 13.00, a major release that introduces a number of highly requested features into the product. The Windows 64-bit player engine is available for new installation and upgrades for players in the network. Player-based preview functionality is fully integrated with Scala Content Manager.
20 July 2023	22Miles Inc.	22Miles introduces the integration of ChatGPT for enhanced wayfinding functionality. This innovative integration leverages event data to offer a conversational interface capable of addressing inquiries related to event schedules, offering precise directions to booths and meeting spaces, furnishing comprehensive session details, and highlighting special events. In conjunction with the unveiling of its upgraded CMS version, 22Miles has significantly amplified the efficiency of digital signage across diverse sectors such as corporate communications, education, healthcare, and hospitality, among others.
28 March 2022	Navori Labs	Navori Labs announced the availability of QL 2.7, the company's first major digital signage software release in several years. Featuring a near complete overhaul of its content management user interface, expanded player functionality and direct integration to Navori's homegrown Aquaji marketing analytics software among other new developments, the new release brings a more responsive user interface, exciting features, and appealing functionality to digital signage users across all business verticals.

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

TABLE 172.   EXPANSION IN DIGITAL SIGNAGE SOFTWARE MARKET, 2020-2023

DATE	COMPANY NAME	DESCRIPTION
22 February 2021	Scala	Stratacache, the parent company of Scala announced the purchase of a 100,000 square foot facility in Lisle, Illinois (Chicago), which will house new research and support teams for the digital signage, intelligent display, and sensor systems company. The Chicago location marks the third facility STRATACACHE has acquired in the past year, in order to support the growing global clientele of the STRATACACHE family of companies, adding several hundred highly technical jobs to the US market.

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

TABLE 173.   ACQUISITION IN DIGITAL SIGNAGE SOFTWARE MARKET, 2020-2023

DATE	COMPANY NAME	DESCRIPTION
07 September 2021	Navori Labs	Navori Labs, a global leader in dynamic display and analytics based on AI and computer vision, has acquired the PlugnCast software business of Innes, the leading French company for dynamic display solutions in corporate and government communications. The acquisition will strengthen Navori Labs' business development in FRENCH and allow Navori Labs to market and sell Innes' dynamic display solutions globally.

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

12. COMPANY PROFILES (SOFTWARE PROVIDERS)

IMPORTANT: This complimentary version does not include all the data provide in the full report. To inquire about receiving the full report, please send us a request at www.22miles.com/contact-us.

13. COMPANY PROFILES (SYSTEM INTEGRATOR)

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