



Robust demand for large scale Digital Signage networks in 2013

Question: How many projects did your company roll out in the following categories in 2013?

- In 2013 almost 50% of all Digital Signage projects were small installations with up to ten displays
- Small projects have a high margin and can be carried out successfully by most players in the market
- Falling hardware prices created a high demand for easy-to-use Digital Signage solutions for small retailers with only one or two shops. Here the switch from consumer to professional displays is also generating recurring revenues
- Almost 40% of the Digital Signage networks installed consisted out of more than 50 displays
- Large projects generate high revenues, but discounts increase with the number of hardware used and tear into the margin
- Only professional market participants can sustainably carry out projects with over 50 displays

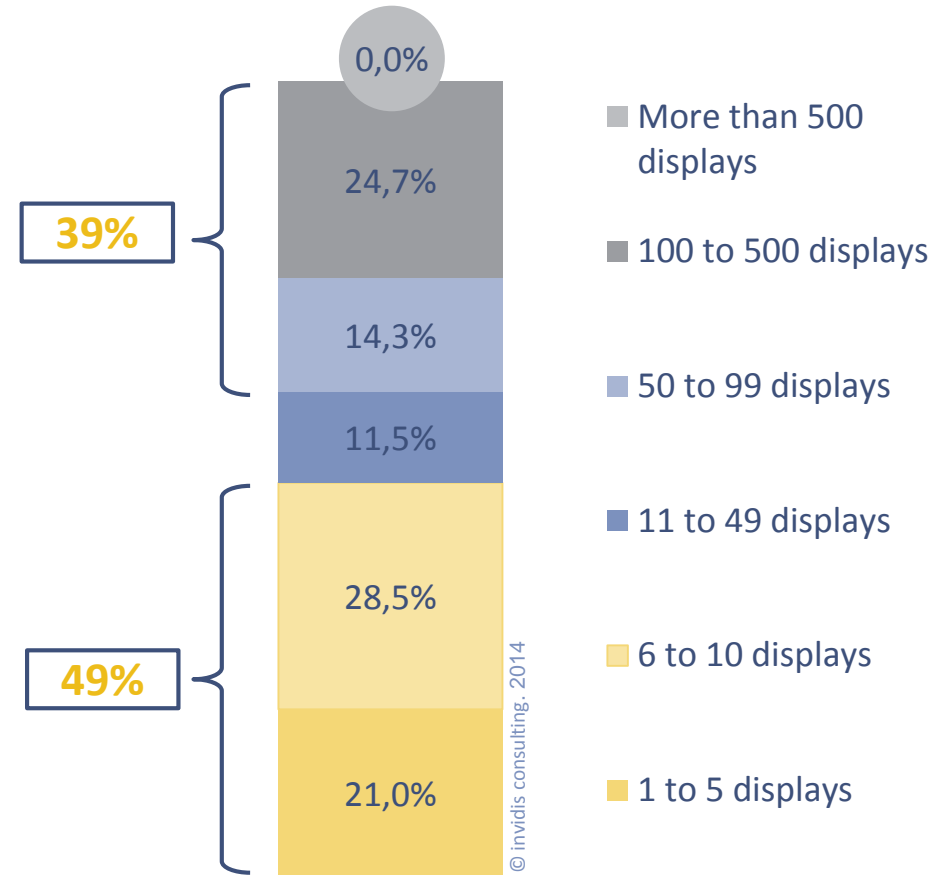


Fig. 4: DBCI Russia May/June 2014 "project sizes 2013", n=10