FROST & SULLIVAN

Frost Radar™: Digital Signage Platforms, 2026

A Benchmarking System to Spark Companies to Action - Innovation That Fuels New Deal Flow and Growth Pipelines

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Strategic Imperative and Growth Environment

Strategic Imperative

- The global digital signage platforms market is entering a more consequential stage of development in which the central challenge is no longer whether organizations can deploy screens, but whether they can manage those screens as secure, intelligent, and measurable digital infrastructure across highly varied physical environments at scale. Digital signage now spans far more than traditional corporate communications or basic in-store displays. It increasingly supports merchandising, advertising, customer engagement, operational messaging, wayfinding, employee communications, training, self-service, and real-time information delivery across retail stores, restaurants, banks, hospitals, factories, campuses, hospitality venues, museums, stadiums, offices, and digital out-of-home (DOOH) media networks. As deployments broaden, many organizations still face fragmented workflows, labor-intensive content creation, difficult integrations, uneven governance, and limited visibility into business outcomes, attribution, and measurable return on investment (ROI) beyond proof of play.
- This market matters because digital signage is evolving from a screen management category to a software-defined layer that connects physical spaces with enterprise data, customer journeys, operational systems, and audience context. A manufacturing dashboard, a hospital display, a university communications network, a retail promotion screen, a quick service restaurant (QSR) menu board, a museum kiosk, a hotel display, and a DOOH network may serve different end goals, but they rely on the same core platform requirements: centralized orchestration, real-time adaptability, distributed control, and dependable execution across many endpoints and environments. The platforms that can abstract that complexity are becoming more strategic because they shape how organizations inform, influence, sell to, and engage people in physical spaces.

Strategic Imperative (continued)

- The most important shift underway is the move from static publishing to intelligent orchestration and connected digital infrastructure. Buyers increasingly expect platforms to do more than schedule playlists. They want AI-assisted content creation, easier localization, automated updates, stronger analytics, broader endpoint coverage, and deeper integration with business systems, collaboration tools, application programming interfaces (APIs), cloud applications, internet of things (IoT) infrastructure, and live data sources. In parallel, the market is stretching in two directions at once: toward simpler, lower-friction deployment for broad communications use cases and toward more interactive, sensor-driven, and self-service experiences in venues where engagement matters as much as broadcast reach. The leading platforms are those that make signage more dynamic, context-aware, measurable, and easier to operate while also positioning screens as an intelligent infrastructure layer connecting content, data, and systems.
- Several disruptive forces have accelerated this transition. One is the rise of retail media and programmatic DOOH monetization, which is pushing digital signage beyond communications into measurable media value, stronger audience targeting, and closer integration with advertising and commerce ecosystems. Another is the expectation for interactive, no-code, and experience-led deployments across hospitality, healthcare, education, cultural institutions, and branded environments. A third is the preference for hardware-agnostic, cloud-native, composable, and flexible deployment models that support system-on-chip (SoC) displays, smart TVs, dedicated players, kiosks, browsers, mixed operating-system environments, and lower-power formats such as ePaper. The forces are expanding the addressable market while also raising expectations for scalability, flexibility, sustainability, and commercial impact.

Strategic Imperative (continued)

- The current state of the industry is, therefore, one of convergence. Digital signage platforms are expected to unify content creation, scheduling, publishing, remote device management, monitoring, analytics, automation, and integration frameworks in a single control plane. They must serve customer-facing and employee-facing environments, monetized and non-monetized use cases, and broadcast and interactive models. At the same time, platforms are being asked to reduce operational burden as networks scale from tens of screens to thousands across multiple venues and geographies. This is pushing the market away from narrow, playback-centric tools and toward more extensible platforms that can support multiple departments, verticals, and communication models from a common foundation.
- Security, governance, and operational resilience have also become much more important. As digital signage becomes more connected to cloud services, data sources, audience measurement systems, and enterprise applications, it is being evaluated as mission-relevant software infrastructure rather than as a peripheral audiovisual (AV) tool. This is especially important in regulated and operationally sensitive environments, such as healthcare, financial services, and large distributed enterprises, but it increasingly applies across the whole market. Role-based controls, secure integrations, device monitoring, diagnostics, reliability, and scalable governance are becoming essential buying criteria, especially where downtime, poor content execution, weak control models, or inadequate vendor risk readiness can affect customer experience, brand trust, operational continuity, or procurement approval.

Strategic Imperative (continued)

- Successful companies in this space are doing several things well. They are reducing the content burden through templates, AI-assisted creation, and workflow automation. They are enabling real-time communications and more dynamic experiences by integrating with operational and business data. They are supporting flexible deployment across a wide range of hardware, operating systems, and screen types. They are improving measurability through analytics that move beyond proof of play toward engagement, operational insight, audience relevance, attribution, or monetization outcomes. And they are pairing software with the services required to deliver value in the field, including onboarding, managed services, deployment support, and long-term customer success. Leadership increasingly depends on serving multiple vertical environments with enough flexibility and clarity of value to become a platform of choice rather than a point solution.
- The strategic imperative in 2026 is clear: digital signage platforms must evolve from basic screen and playlist management systems to secure, interoperable, and outcome-oriented software platforms that can support communications, engagement, commerce, self-service, and operational responsiveness across many types of physical environments. The companies that combine intelligent automation, open integration, composable architecture, deployment flexibility, strong governance, and measurable value across retail, DOOH, hospitality, healthcare, education, manufacturing, public venues, and workplace settings will define the next phase of market leadership. Those that remain centered mainly on basic playback and display administration will face more pressure as customer expectations continue to broaden.

Growth Environment

- The digital signage platforms market is in a solid mid-growth phase. The sector continues to expand as buyers move from isolated screens to software-led, multi-endpoint networks tied to communications, operations, customer engagement, self-service, monetization, and increasingly measurable business outcomes. Frost & Sullivan estimates that market revenue will reach $1.23 billion in 2026 and increase at a 12.6% compound annual growth rate from 2026 to 2032.
- No single provider dominates the sector across all environments, verticals, or geographies. Competition is spread across mainstream cloud signage content management system (CMS) vendors, workplace communications platforms, managed service-led providers, interactive experience specialists, and DOOH- or retail media-oriented platforms. The most important commercial model today is recurring software revenue built around software as a service (SaaS) subscriptions, platform-tied services, and optional managed support.
- Growth is being driven by four main forces. First, AI is starting to improve content creation and network operations by reducing manual effort in design, translation, localization, monitoring, automation, and optimization. Second, buyers want integrations with business systems, collaboration tools, APIs, point-of-sale environments, IoT infrastructure, and live data sources so content can reflect real-world conditions and fit into broader enterprise workflows. Third, retail media and programmatic DOOH are increasing the commercial value of screen networks. Fourth, SoC support, browser-based delivery, broader hardware compatibility, and lower-power deployment options are lowering deployment friction and expanding adoption.
- Innovation is no longer centered mainly on better displays or easier playlisting. It is now shifting to intelligent orchestration, including AI-assisted authoring, automated diagnostics, no-code interactivity, real-time data activation, and analytics that go beyond proof of play toward attribution and ROI.

Source: Frost & Sullivan

Growth Environment (continued)

- At the same time, the market is beginning to bifurcate: basic broadcast CMS functionality is becoming more standardized, while faster growth is forming around interactive deployments, AI-native workflows, open and composable platforms, and monetizable retail and DOOH environments.
- The market still faces meaningful restraints. Integration complexity remains a major obstacle, especially where deployments must connect to enterprise systems, data services, or IoT infrastructure. Hardware and operating system fragmentation also increase implementation effort and total cost of ownership, while tariffs, memory component price spikes, electronics supply disruptions, and geopolitical instability are raising cost and availability risk for displays, media players, sensors, and embedded compute. The pressures do not change the positive long-term outlook, but they increase buyer focus on hardware-agnostic deployment, lifecycle management, flexible endpoint support, and vendor operational resilience. Many organizations also continue to struggle with content creation bandwidth, governance, cross-functional ownership, and proving ROI outside revenue-generating or highly measurable use cases.
- Regulation and governance are becoming more important as well. In Europe, the AI Act, Cyber Resilience Act, NIS2, and the European Accessibility Act are raising expectations about trustworthy AI, cybersecurity, resilience, and accessibility. That is pushing digital signage further into the category of enterprise-grade digital infrastructure rather than peripheral AV software.
- Overall, the outlook remains positive. Growth should stay strongest where platforms combine AI-assisted creation, automation, open integrations, flexible hardware support, stronger analytics, measurable business impact, and services that reduce deployment and management burden. Companies most likely to gain share will be those that turn digital signage into a scalable software platform for communications, engagement, commerce, and operational responsiveness.

Source: Frost & Sullivan

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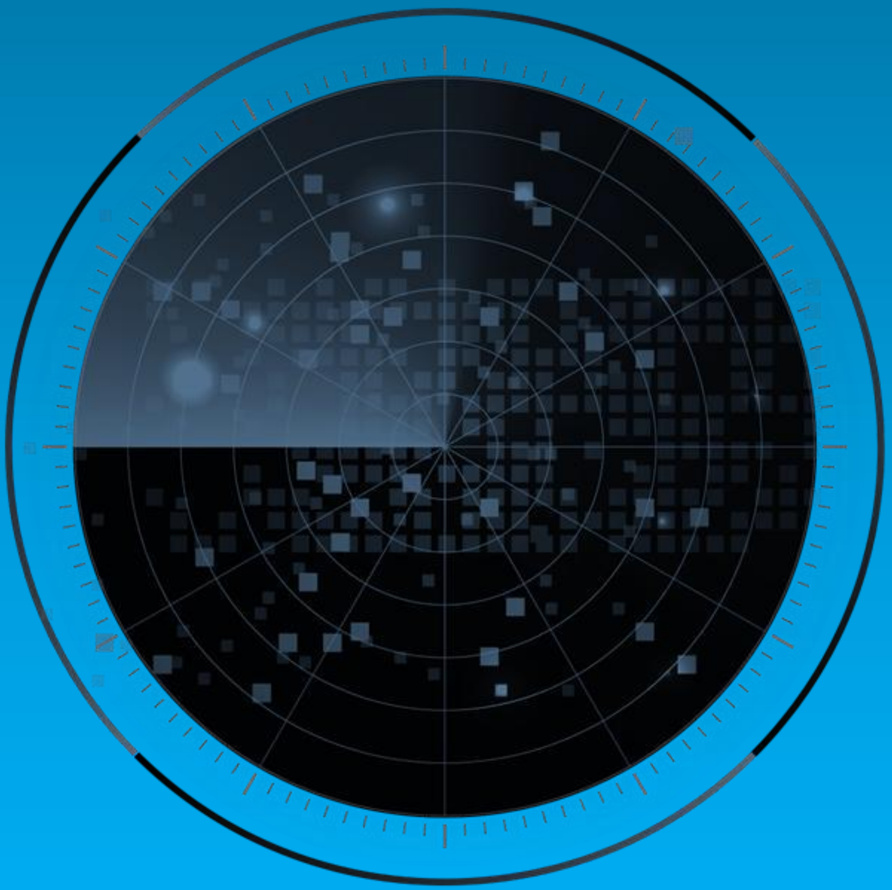
Frost Radar™: Digital Signage Platforms



Frost Radar™: Digital Signage Platforms

In a fragmented market with about 40 qualified participants, Frost & Sullivan independently evaluated the landscape and selected just 18 companies to be benchmarked in this Frost Radar™. This small, carefully chosen group represents organizations that rise above the broader market; demonstrating not only strong growth, but a clear capacity to innovate and lead. Inclusion is not simply recognition; it signals that a company is operating at the forefront of its industry.

This evaluation is led by Frost & Sullivan's experienced global analyst team, combining deep domain expertise with a rigorous, fact-based approach. Using our proprietary, multi-dimensional benchmarking methodology, applied consistently and validated by analysts. Frost & Sullivan ensures a fair, globally comparable, and defensible assessment of true market leadership.

Source: Frost & Sullivan

Frost Radar™: Competitor Categories

GROWTH CHAMPIONS

- Achieve significant market growth through effective execution.
- Leverage proven technologies and scalable business models.
- Maintain competitiveness via operational efficiency and customer focus.
- Require increased innovation investment for sustained leadership.

VISIONARY LEADERS

- Market leaders with strong balance of innovation and growth.
- Deliver transformative technologies, business models, and processes.
- Influence industry direction and set new benchmarks.
- Combine strategic vision with operational excellence for market dominance.

CONTENDERS

- Emerging players with modest market presence and cautious strategies.
- Often new entrants or niche participants establishing their position.
- Emphasizes continuous improvement and ensures operational reliability.
- Hold potential for growth through innovation, alliances, and market expansion.

INNOVATORS

- Drive technological advancement with disruptive ideas and solutions.
- Prioritize R&D, IP development, and pioneering concepts.
- Strong innovation foundation with opportunities to accelerate commercialization and scale.
- Benefit from strategic partnerships and targeted go-to-market strategies.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment

- The digital signage platforms market is increasingly structured around clear competitive profiles rather than a scattered field of undifferentiated vendors. That is a sign of a healthy and evolving market. Customers can choose from providers with strengths in enterprise communications, workplace experience, retail media and DOOH monetization, interactive engagement, managed services, infrastructure reliability, and deployment flexibility. The diversity reflects the broad range of customer requirements across retail, hospitality, healthcare, education, financial services, manufacturing, public venues, and corporate environments.
- The companies on the Frost Radar™ are most likely to influence the next phase of the market. To qualify, each company needed to offer a proprietary digital signage platform with native CMS, scheduling, publishing, and remote device management; support centralized, multi-endpoint deployments; demonstrate enterprise-scale production use; maintain control over product development and roadmap; and show meaningful traction across vertical markets. What distinguishes these companies from the broader field is their ability to translate platform capabilities into real-world deployments, differentiated customer value, and credible market momentum.
- Broadsign (4.80 Innovation, 4.45 Growth) stands out as the Growth leader and one of the market's strongest overall performers. Its position reflects a compelling combination of scale, monetization capability, and operational maturity, particularly across retail media, programmatic DOOH, and hybrid static/DOOH environments. Navori Labs (4.85 Innovation, 4.20 Growth) is the Innovation leader, reflecting outstanding product depth and one of the market's strongest software-centric value propositions, reinforced by AI-enabled platform intelligence, composable architecture, retail media enablement, ecosystem integration, and scalable omnichannel infrastructure.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment (continued)

- A leading enterprise platform cluster includes Poppulo, Appspace, and STRATACACHE. Poppulo (4.50 Innovation, 3.95 Growth) is strongly positioned where digital signage intersects with employee communications, real-time data activation, operational messaging, and large-scale endpoint governance. Appspace (4.40 Innovation, 3.80 Growth) also sits firmly in the leading group, supported by its differentiated position at the convergence of digital signage, workplace experience, intranet, employee communications, and physical space coordination. STRATACACHE (4.45 Innovation, 3.75 Growth) remains one of the market's most strategically important full-stack providers, with substantial capabilities across enterprise signage, retail media, QSR automation, analytics, and managed infrastructure; however, recent restructuring signals and the liquidation of its UK entities introduce higher near-term execution risk, moderating its Growth position relative to providers with clearer commercial momentum.
- A strong upper-middle cluster shows how much capability now exists across the category. OptiSigns (4.25 Innovation, 4.00 Growth) stands out for its balanced profile, pairing solid innovation with strong growth momentum. Yodeck (3.70 Innovation, 4.15 Growth) is especially noteworthy for its impressive growth trajectory, underscoring market demand for accessible, cloud-first deployment models. ScreenCloud (4.20 Innovation, 3.75 Growth) continues to strengthen its position through cloud CMS usability, purpose-built signage OS capabilities, remote device management, and private equity-backed scale-up potential. BrightSign (4.00 Innovation, 3.80 Growth) remains highly relevant as the market shifts to software-defined endpoint infrastructure, embedded compute, edge AI, and ecosystem-led deployment models.

Frost Radar™ Competitive Environment (continued)

- Another important cluster is defined by enterprise usability, integration depth, and operational control. Korbyt (4.40 Innovation, 3.55 Growth) brings one of the stronger enterprise innovation stories in the market, particularly through AI-enabled content, analytics, workplace workflows, and device management capabilities. TelemetryTV (4.20 Innovation, 3.35 Growth) contributes to the innovation-forward middle of the market through its cloud-first platform orientation, enterprise usability, and integration-led approach. Spectrio (4.00 Innovation, 3.60 Growth) holds an important position through its combination of digital signage, managed content, retail media enablement, audience measurement, and broader customer engagement services.
- A practical deployment and operations cluster includes providers that differentiate through reliability, flexibility, ease of use, managed support, and fleet control. firmChannel (4.20 Innovation, 3.40 Growth) is well aligned with secure, partner-led, mixed-fleet enterprise deployments that require centralized governance, operational visibility, AI-assisted operations, and strong permission controls. MediaTile (4.00 Innovation, 3.40 Growth) is positioned around accessible professional signage, combining ease of use, fast onboarding, practical AI assistance, flexible hardware support, and direct customer support for organizations that want professional CMS capabilities without heavy technical complexity. Hughes (3.85 Innovation, 3.20 Growth) adds strength in managed services, operational reliability, flexible endpoint support, and distributed network support for customers that need signage operations assistance as much as CMS functionality.

Source: Frost & Sullivan

Frost Radar™ Competitive Environment (continued)

- A specialized innovation cluster is defined by clear market identity and strong fit with specific customer priorities. Intuiface (4.30 Innovation, 2.90 Growth) brings one of the market's clearest interactivity-led propositions, with an emphasis on no-code experience creation, immersive engagement, and proof-of-engagement analytics. SpinetiX (4.15 Innovation, 3.10 Growth) contributes a focused and respected signage proposition built around dependable execution, product craftsmanship, and integration-led deployment. Mvix (4.00 Innovation, 2.95 Growth) enriches the field with a balanced platform approach that includes secure data visualization, GovSec-oriented capabilities, Power BI GCC/GCC High support, and turnkey deployment services.
- The Frost Radar™ shows that the market is advancing through several parallel paths of innovation and growth. Appspace, Poppulo, Korbyt, and ScreenCloud highlight the convergence of signage with employee communications and workplace experience. Broadsign, Navori Labs, STRATACACHE, Spectrio, firmChannel, and MediaTile show the growing importance of monetization, retail media, programmatic DOOH, and large-scale network orchestration, although each approaches these opportunities from a different market position. Intuiface illustrates the rise of interactive and experience-led deployments. BrightSign, Hughes, SpinetiX, firmChannel, and MediaTile reinforce the value of operational simplicity, infrastructure reliability, security, and flexible deployment models. OptiSigns, ScreenCloud, TelemetryTV, Mvix, and Yodeck add proof that the market is rich with credible providers, each bringing distinctive strengths and clear relevance to evolving customer needs.
- Overall, the Frost Radar™ reflects a competitive and diverse market where leadership can take multiple forms. Providers are being rewarded for cloud scalability, open integration, AI-assisted workflows, deployment flexibility, governance, measurable value, and resilient execution. The broad spread of companies shows strong competitive depth and a market with several credible paths to leadership.

Source: Frost & Sullivan

Frost Radar™: Companies to Action

Broadsign

VISIONARY LEADER

INNOVATION SCORE **4.80**

GROWTH SCORE **4.45**

INNOVATION

- Broadsign operates as a full-stack technology provider for the global digital signage and DOOH markets, offering a platform designed to help media owners and retailers build, monetize, and scale complex networks. The company's core value proposition lies in its ability to enable clients to manage both static and digital signage networks from a single, unified interface. This is supported by an expansive suite of programmatic advertising solutions that provide access to global demand partners, positioning Broadsign as a critical bridge between physical infrastructure and digital advertising ecosystems. The platform is built on a software-as-a-service (SaaS) model, alongside a programmatic media trading platform to help monetize the screens, that prioritizes reliability and enterprise-grade scalability, catering to some of the largest screen deployments in the world.
- What distinguishes Broadsign in a crowded market is its commitment to a campaign-focused management philosophy rather than a player-based one. By managing networks at the top level with embedded rules that automatically generate content loops, the platform eliminates the manual effort required to manage individual playlists. This architectural choice allows for seamless scaling from a few dozen screens to hundreds of thousands of devices without a proportional increase in human resources.
- A critical differentiator for enterprise clients is the platform's security posture. Broadsign has maintained SOC 2 Type 2 compliance for its digital signage platform, providing independently audited assurance around security, data protection, and operational controls.
- The company offers a powerful open API with more than 100 active integrations, allowing developers to build custom applications and personalized reporting dashboards that integrate directly with the Broadsign Server.

Source: Frost & Sullivan

Broadsign (continued)

VISIONARY LEADER

INNOVATION SCORE **4.80**

GROWTH SCORE **4.45**

INNOVATION

- The company has increasingly prioritized AI to drive efficiency, notably through its AI Creative Categorization and Approval Assistant introduced in early 2025. The patent-pending tool utilizes machine learning to automate the review and classification of programmatic ad creatives.
- The last 18 months have seen a rapid succession of strategic moves, most notably the acquisition of Place Exchange in November 2025. This acquisition integrated a leading independent OOH supply-side platform (SSP) directly into Broadsign's ecosystem, creating a comprehensive global solution that combines CMS, ad serving, and buy- and sell-side capabilities. This move was followed by a major integration in December 2025 with Google's Display & Video 360, bringing Programmatic Guaranteed capabilities to the digital signage market and allowing media buyers to secure premium inventory with guaranteed pricing through standard digital workflows. In early 2026, the company further expanded its programmatic reach through an integration with DIRECTV Advertising, enabling programmatic access to premium live TV inventory in commercial venues, such as retail stores and restaurants.
- Recent platform updates have also focused on streamlining the user experience and bridging the gap between different signage formats. In August 2025, Broadsign introduced unified campaign planning workflows, allowing media owners to manage both static and digital inventory within a single proposal, solving a long-standing pain point for hybrid network operators. This was complemented in December 2025 by a total redesign of the campaign planning window, which introduced over 50 new features including real-time campaign metrics, goal tracking, and simplified creative management tools for multimessage or multivenue campaigns. These innovations are supported by the company's Perview audience measurement solution, which provides deterministic data on reach and frequency, ensuring that advertisers have access to verified, industry-standard metrics for their deployments.

Source: Frost & Sullivan

Broadsign (continued)

VISIONARY LEADER

INNOVATION SCORE **4.80**

GROWTH SCORE **4.45**

GROWTH

- Broadsign has demonstrated consistent year-over-year growth through 2025 and into the first half of 2026, driven largely by its strategic focus on the burgeoning retail media sector and the expansion of programmatic revenue streams. The company powers more than 3 million individual signs globally, including the world's largest digital signage networks that encompass over 150,000 unique devices each. Its geographic footprint is equally extensive, with clients active in more than 100 countries. This growth is supported by a robust global sales and marketing organization that has established a mature demand generation pipeline across core international markets.
- A primary catalyst for recent growth has been the company's aggressive move into retail media as retailers seek to monetize their in-store environments. Broadsign has secured or expanded relationships with major international retail and pharmacy brands, including Sainsbury’s, Woolworths, Avolta, and DOUGLAS, as well as specialized providers, such as PatientPoint. Its monetization solutions are deeply embedded with global giants, such as Walmart, Target, Kroger, and Albertsons. The 2025 acquisition of Place Exchange bolstered Broadsign's programmatic offering, opening new revenue opportunities by providing demand-side platforms (DSPs) with greater access to premium international inventory.
- By positioning itself as a platform spanning static, digital, and programmatic workflows in one environment, Broadsign has captured market share from smaller specialized providers and larger corporate divisions. Its organic reach and presence in major industry associations continue to drive demand, ensuring a strong pipeline for the remainder of 2026 and beyond.

Broadsign (continued)

VISIONARY LEADER

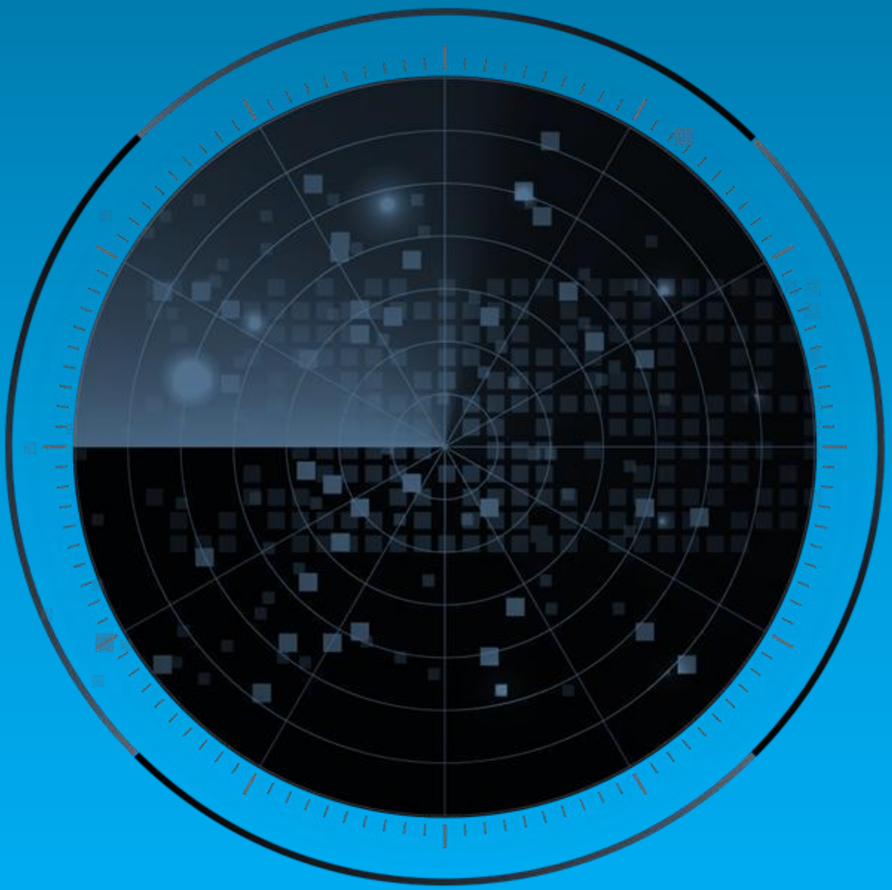
INNOVATION SCORE **4.80**

GROWTH SCORE **4.45**

FROST PERSPECTIVE

- Broadsign's most significant competitive advantage is its full-stack capability that bridges the gap between static and digital signage within a programmatic ecosystem. To leverage this strength, the company should focus on positioning its platform as the operating system for the total store environment in retail media, rather than just an advertising tool. By integrating deeper with point-of-sale (POS) data and inventory management systems, Broadsign can move from providing media value to providing operational value, making its software indispensable to a retailer's core business functions beyond the marketing department.
- As Broadsign expands through acquisitions and adjacent capabilities, it should ensure that portfolio breadth does not become portfolio complexity. A unified user experience, consistent reporting, shared inventory logic, and clearer product packaging would help customers understand where each capability fits across sales, operations, content, finance, and measurement teams.
- Broadsign should continue advancing AI where it has a natural data and workflow advantage: yield optimization, campaign pacing, inventory rebalancing, creative approval, predictive issue detection, and network operations. In parallel, the company's ongoing investments in automated workflows, combined with its deep integrations with demand-side platforms and extensive access to global inventory, position it well to evolve toward more autonomous, agent-driven capabilities on the sell-side.
- Broadsign holds a distinct competitive advantage as the only provider in the digital signage industry to carry SOC 1 certification, which is bolstered by SOC 2 Type 2 and ISO 27001 credentials. To leverage this strength, the company should actively pivot its market positioning to target mission-critical communications in highly regulated sectors, such as government, finance, and critical infrastructure.

Best Practices & Growth Opportunities



Best Practices

1

Embed AI across content creation, localization, scheduling, diagnostics, and reporting to reduce manual workload while preserving brand control, governance, and human oversight. Providers should focus on practical AI workflows that improve daily operations, not isolated features that are difficult to measure.

2

Build open, secure, cloud-native platforms that integrate with enterprise data, collaboration tools, BI systems, APIs, and mixed device fleets from one control plane. The goal should be to make digital signage part of the enterprise technology stack rather than a stand-alone screen-management tool.

3

Move analytics beyond proof of play by linking screen uptime, content performance, audience signals, and business data to measurable communication, operational, or revenue outcomes. Providers that quantify impact will be better positioned to justify investment and support expansion in customer accounts.

Growth Opportunities

1. Package vertical solutions for retail, QSR, healthcare, manufacturing, education, and workplace communications with templates, integrations, workflows, and deployment guidance that accelerate time to value. Verticalization helps providers move beyond generic CMS positioning and solve clearer, higher-value business problems.

2. Expand retail media and programmatic DOOH capabilities with inventory management, audience targeting, automated campaign delivery, measurement, and secure demand-side ecosystem integrations. This can help customers turn screen networks into monetizable assets while creating recurring revenue opportunities for platform providers.

3. Capture emerging and mid-market demand through hardware-agnostic deployment, SoC and low-cost player support, localized partners, flexible pricing, and simplified onboarding. Providers that lower adoption barriers without sacrificing reliability, security, or scalability can expand faster across price-sensitive and high-growth regions.

Source: Frost & Sullivan

Frost Radar™ Analytics

Frost Radar™: Benchmarking Future Growth Potential
2 Major Indices, 10 Analytical Ingredients, 1 Platform

Growth Index

Growth Index (GI) is a measure of a company's growth performance and track record, along with its ability to develop and execute a fully aligned growth strategy and vision; a robust growth pipeline system; and effective market, competitor, and end-user focused sales and marketing strategies.

GI1

MARKET SHARE (PREVIOUS 3 YEARS)
This is a comparison of a company's market share relative to its competitors in a given market space for the previous 3 years.

GI2

REVENUE GROWTH (PREVIOUS 3 YEARS)
This is a look at a company's revenue growth rate for the previous 3 years in the market/industry/category that forms the context for the given Frost Radar™.

GI3

GROWTH PIPELINE
This is an evaluation of the strength and leverage of a company's growth pipeline system to continuously capture, analyze, and prioritize its universe of growth opportunities.

GI4

VISION AND STRATEGY
This is an assessment of how well a company's growth strategy is aligned with its vision. Are the investments that a company is making in new products and markets consistent with the stated vision?

GI5

SALES AND MARKETING
This is a measure of the effectiveness of a company's sales and marketing efforts in helping it drive demand and achieve its growth objectives.

Source: Frost & Sullivan

Frost Radar™: Benchmarking Future Growth Potential
2 Major Indices, 10 Analytical Ingredients, 1 Platform (continued)

Innovation Index

Innovation Index (II) is a measure of a company's ability to develop products/ services/ solutions (with a clear understanding of disruptive megatrends) that are globally applicable, are able to evolve and expand to serve multiple markets and are aligned to customers' changing needs.

II1

INNOVATION SCALABILITY
This determines whether an organization's innovations are globally scalable and applicable in both developing and mature markets, and also in adjacent and non-adjacent industry verticals.

II2

RESEARCH AND DEVELOPMENT
This is a measure of the efficacy of a company's R&D strategy, as determined by the size of its R&D investment and how it feeds the innovation pipeline.

II3

PRODUCT PORTFOLIO
This is a measure of a company's product portfolio, focusing on the relative contribution of new products to its annual revenue.

II4

MEGATRENDS LEVERAGE
This is an assessment of a company's proactive leverage of evolving, long-term opportunities and new business models, as the foundation of its innovation pipeline. An explanation of megatrends can be found here.

II5

CUSTOMER ALIGNMENT
This evaluates the applicability of a company's products/services/solutions to current and potential customers, as well as how its innovation strategy is influenced by evolving customer needs.

Source: Frost & Sullivan

Next Steps: Leveraging the Frost Radar™ to Empower Key Stakeholders

Significance of Being on the Frost Radar™

Companies plotted on the Frost Radar™ are the leaders in the industry for growth, innovation, or both. They are instrumental in advancing the industry into the future.

GROWTH POTENTIAL

Your organization has significant future growth potential, which makes it a Company to Action.

BEST PRACTICES

Your organization is well positioned to shape Growth Pipeline™ best practices in your industry.

COMPETITIVE INTENSITY

Your organization is one of the key drivers of competitive intensity in the growth environment.

CUSTOMER VALUE

Your organization has demonstrated the ability to significantly enhance its customer value proposition.

PARTNER POTENTIAL

Your organization is top of mind for customers, investors, value chain partners, and future talent as a significant value provider.

Source: Frost & Sullivan

Frost Radar™ Empowers the CEO's Growth Team

STRATEGIC IMPERATIVE

- Growth is increasingly difficult to achieve.
- Competitive intensity is high.
- More collaboration, teamwork, and focus are needed.
- The growth environment is complex.

LEVERAGING THE FROST RADAR™

- The Growth Team has the tools needed to foster a collaborative environment among the entire management team to drive best practices.
- The Growth Team has a measurement platform to assess future growth potential.
- The Growth Team has the ability to support the CEO with a powerful Growth Pipeline™.

NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**
- **Growth Pipeline™ Dialogue with Team Frost**

Source: Frost & Sullivan

Frost Radar™ Empowers Investors

STRATEGIC IMPERATIVE

- Deal flow is low and competition is high.
- Due diligence is hampered by industry complexity.
- Portfolio management is not effective.

LEVERAGING THE FROST RADAR™

- Investors can focus on future growth potential by creating a powerful pipeline of Companies to Action for high-potential investments.
- Investors can perform due diligence that improves accuracy and accelerates the deal process.
- Investors can realize the maximum internal rate of return and ensure long-term success for shareholders
- Investors can continually benchmark performance with best practices for optimal portfolio management.

NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Opportunity Universe Workshop**
- **Growth Pipeline Audit™ as Mandated Due Diligence**

Source: Frost & Sullivan

Frost Radar™ Empowers Customers

STRATEGIC IMPERATIVE

- Solutions are increasingly complex and have long-term implications.
- Vendor solutions can be confusing.
- Vendor volatility adds to the uncertainty.

LEVERAGING THE FROST RADAR™

- Customers have an analytical framework to benchmark potential vendors and identify partners that will provide powerful, long-term solutions.
- Customers can evaluate the most innovative solutions and understand how different solutions would meet their needs.
- Customers gain a long-term perspective on vendor partnerships.

NEXT STEPS

- **Growth Pipeline™ Dialogue**
- **Growth Pipeline™ Diagnostic**
- **Frost Radar™ Benchmarking System**

Source: Frost & Sullivan

Frost Radar™ Empowers the Board of Directors

STRATEGIC IMPERATIVE

- Growth is increasingly difficult; CEOs require guidance.
- The Growth Environment requires complex navigational skills.
- The customer value chain is changing.

LEVERAGING THE FROST RADAR™

- The Board of Directors has a unique measurement system to ensure oversight of the company's long-term success.
- The Board of Directors has a discussion platform that centers on the driving issues, benchmarks, and best practices that will protect shareholder investment.
- The Board of Directors can ensure skillful mentoring, support, and governance of the CEO to maximize future growth potential.

NEXT STEPS

- **Growth Pipeline Audit™**
- **Growth Pipeline as a Service™**

Next Steps

JOIN:
Growth Council

APPLY:
Companies to Action

ENGAGE:
Growth Dialog

PARTICIPATE:
Growth Council Think Tank

Does your current system support rapid adaptation to emerging opportunities?

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