360iResearch

Crowd Management Software Market

Global Forecast 2026-2032

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1. Preface

1.1. Objectives of the Study

- Which documented offerings provide the accepted crowd-management functions, and when are focused applications, integrated suites, or adjacent technology platforms commercially comparable for the same buyer task?
- Which buyer qualification, approval, accountability, and benefit-evidence requirements determine whether software is suitable for each accepted End User and Application?
- Which data-access rights, privacy obligations, cybersecurity requirements, and permitted-use conditions must buyers and suppliers verify for each Crowd Data Source and intended jurisdiction?
- What integration capabilities, delivery responsibilities, and support commitments are required for On-Premises, Hosted, and Hybrid deployments across Indoor, Outdoor, and Indoor and Outdoor environments?
- How do interoperability, data portability, contractual restrictions, and continuity requirements affect a buyer's choice to retain, extend, replace, or combine crowd-management software?
- How do Perpetual Licenses and Term Licenses allocate usage rights, renewal exposure, and ongoing obligations, and what must be established before comparing their suitability for a buyer?
- Which commercial rights and responsibilities distinguish Direct Sales from Indirect Sales, and what supplier, reseller, or integration commitments are necessary to make a proposed purchasing route usable?
- What offering-level evidence distinguishes competitive alternatives, complements, and differentiated capabilities, and which jurisdiction-specific access conditions could change a buyer's shortlist or a supplier's participation decision?

1.2. Market Definition

Crowd Management Software comprises software for planning and managing crowd presence, movement, access, communication, and associated operational and commercial decisions in physical spaces, including proposed site or venue designs. The accepted offerings are Crowd Planning and Simulation Software; Crowd Monitoring and Analytics Software; Queue and Arrival Management Software; Capacity and Admission Control Software; Crowd Guidance and Communication Software; Crowd Operations Coordination Software; and Integrated Crowd Management Suites. Both scenario-based planning and software supporting ongoing crowd operations are included.

The geographic boundary is Global. The buyer and user boundary encompasses the full accepted End User hierarchy, including public, commercial, institutional, and membership settings. On-Premises, Hosted, and Hybrid delivery; Perpetual Licenses and Term Licenses;

Direct Sales and Indirect Sales; and Indoor, Outdoor, and Indoor and Outdoor operating contexts are included as distinct classifications of the software relationship.

The study follows software from the provider and its commercial rights through the sales relationship to the buyer's intended application. Scenario inputs, sensing systems, wireless signals, mobile location information, admission records, and human reports are relevant through the accepted Crowd Data Source hierarchy. Standalone hardware, connectivity, physical crowd-control equipment, staffing, advisory work, and the underlying venue or event activity are adjacent inputs or activities rather than additional Software Offering categories. Their involvement does not extend the study to every product or service supplied by the same organization.

1.3. Market Segmentation & Coverage

Software Offering distinguishes the purchased function: Crowd Planning and Simulation Software; Crowd Monitoring and Analytics Software; Queue and Arrival Management Software; Capacity and Admission Control Software; Crowd Guidance and Communication Software; Crowd Operations Coordination Software; and Integrated Crowd Management Suites. This axis retains both focused applications and combined software offerings.

Crowd Data Source covers Scenario and Design Inputs; Image and Video Data; Non-Imaging Sensor Data; Wireless Signal Data; Mobile Location Data; Admission and Queue Records; Human-Reported Data; and Multi-Source Data Fusion. It identifies the information dependencies of the studied software, including planning inputs and operational information, without treating underlying hardware or data businesses as additional software offerings.

Application covers Capacity and Space Planning; Crowd Safety and Security; Emergency Preparedness and Response; Flow and Queue Efficiency; Staffing and Resource Optimization; Visitor Guidance and Experience; and Commercial Performance Optimization. This axis identifies the buyer's intended decision or use rather than presuming that each application requires a separate product.

End User covers Transportation and Logistics; Sports and Live Events; Leisure Attractions and Cultural Institutions; Wholesale and Retail Trade; Accommodation and Food Services; Education and Libraries; Healthcare and Social Assistance; Finance and Insurance; Real Estate and Facilities Management; Industrial and Infrastructure Operators; Government and Public Safety; Religious and Membership Organizations; Professional and Business Services; Information and Telecommunications; and Personal Services. The axis places purchasing and use requirements within the accepted sector context.

Deployment Model includes On-Premises, Hosted, and Hybrid. It distinguishes delivery arrangements and the associated allocation of hosting, integration, and service responsibilities.

License Term includes Perpetual Licenses and Term Licenses. It addresses the duration of software rights independently of deployment location or the sales channel.

Sales Channel includes Direct Sales and Indirect Sales. It identifies the route of the commercial relationship and the need to distinguish the publisher's commitments from those of an intermediary.

Operating Environment includes Indoor, Outdoor, and Indoor and Outdoor. It preserves separate indoor, outdoor, and combined environmental coverage without conflating the setting with the deployment model.

Table 1. Global Crowd Management Software Market Segmentation & Coverage

Segmentation	Coverage
Application	• Flow and Queue Efficiency • Visitor Guidance and Experience • Crowd Safety and Security • Staffing and Resource Optimization • Capacity and Space Planning • Commercial Performance Optimization • Emergency Preparedness and Response
Crowd Data Source	• Admission and Queue Records • Image and Video Data • Multi-Source Data Fusion • Wireless Signal Data • Non-Imaging Sensor Data • Scenario and Design Inputs • Mobile Location Data • Human-Reported Data
Deployment Model	• Hosted • On-Premises • Hybrid
End User	• Wholesale and Retail Trade • Transportation and Logistics • Healthcare and Social Assistance • Leisure Attractions and Cultural Institutions • Government and Public Safety • Finance and Insurance • Sports and Live Events • Education and Libraries • Professional and Business Services • Real Estate and Facilities Management • Accommodation and Food Services • Information and Telecommunications • Personal Services • Industrial and Infrastructure Operators • Religious and Membership Organizations
License Term	• Term Licenses • Perpetual Licenses

Table 1 - continued

Segmentation	Coverage
Operating Environment	• Indoor • Indoor and Outdoor • Outdoor
Sales Channel	• Direct Sales • Indirect Sales
Software Offering	• Queue and Arrival Management Software • Crowd Monitoring and Analytics Software • Integrated Crowd Management Suites • Crowd Planning and Simulation Software • Capacity and Admission Control Software • Crowd Operations Coordination Software • Crowd Guidance and Communication Software

Sources & Evidence

1. ISO 22353:2026 - Security and resilience - Guidelines for crowd management

· Taxonomy evidence: The standard published in August 2026 addresses events, mass gatherings and crowded places, including capacity assessment, ingress, circulation, egress and emergency planning. It supports the physical crowd-management boundary, not a software-market classification or evidence of 2025 sales. ([iso.org](https://www.iso.org/standard/xx.xx.html))

· Taxonomy evidence: The abstract identifies organizers, rights holders, hosts, venue operators and emergency services as stakeholders. These are stakeholder roles, not automatically separate buyer sectors or confirmed software customers. ([iso.org](https://www.iso.org/standard/xx.xx.html))

· Taxonomy evidence: The standard distinguishes planned crowd management and emergencies while excluding intervention-oriented crowd control from its own scope. This supports keeping physical crowd objectives distinct from general enforcement services; it does not impose the retained application partition. ([iso.org](https://www.iso.org/standard/xx.xx.html))

2. 2022 NAICS Manual

- Taxonomy evidence: The manual states that ownership generally does not determine industry classification and distinguishes government program administration from operating activities. This supports the buyer-axis operating-activity rule, not crowd-software adoption. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: NAICS distinguishes operating industries from public administration, including publicly operated hospitals and transport facilities. It provides classification references, not crowd-software demand estimates. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Government airport operation is distinguished from transportation-program administration; schools and healthcare operating establishments are also classified outside public administration. Public ownership therefore does not alone place these operators in this buyer category. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Facilities support services and nonresidential property management have explicit classifications. Their combination here is analytical and does not establish a qualifying software purchase. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Property leasing and management are distinguished from retailing. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: The manual distinguishes complete operation of a client's business from facilities support and individual support services. This supports separating professional-service customers from operating clients and independent facilities operators. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Professional, engineering, security, and administrative-service activities are separately identifiable. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Wholesale and retail trade have distinct operating-sector classifications. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Primary production, mining, utilities, construction, and manufacturing have explicit classifications. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Religious and membership organizations have explicit classifications. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Publishing and telecommunications are identifiable information-sector activities. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Repair and personal-service activities have explicit service classifications. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Finance and insurance form a distinct sector. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Museums, historical sites, and amusement or recreation operations are identifiable activities. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: Libraries are classified separately from educational services; their combination here is analytical. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))

3. Traffic Modelling Guidelines v4

   · Taxonomy evidence: The September 2021 guidance distinguishes static pedestrian assessment from dynamic specialist-software modeling and allows their combined use. This supports retaining one planning-and-simulation offering family rather than assuming separate commercial entitlements for each method. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Taxonomy evidence: The September 2021 transport guidance distinguishes static pedestrian assessment from dynamic microsimulation using specialist software and describes comparisons of layouts and scenarios. It establishes a planning/modeling software function, not Global software-approval requirements or consultancy revenue. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Taxonomy evidence: The Parliament Square case connects street-level space with an underpass through Westminster Underground station. This establishes cross-environment modeling relevance, but not one inseparable commercial license or its software value. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Taxonomy evidence: The guidance treats spatial layouts and pedestrian demand as modeling inputs. Its local assessment requirements support the source-family rationale but do not prescribe the analytical precedence between scenario-only and observation-dependent workloads. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Taxonomy evidence: The guidance identifies spatial layouts and current or predicted pedestrian volumes as modeling inputs. This supports a design-and-demand input family; the response's scenario-only allocation precedence remains an analytical convention. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Taxonomy evidence: The pedestrian-modeling chapter addresses assessment of schemes affecting pedestrian movement, including station environments and surface transport hubs. It supports capacity and layout planning as a distinct demand objective; London's requirements are not treated as Global regulation. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Taxonomy evidence: The guidance explicitly covers pedestrian assessment around rail stations and public transport facilities, supporting the passenger-transport portion of the buyer grouping rather than freight or warehousing adoption. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

4. The provision of Microsimulation Traffic Modelling Software - 2025/S 000-069773

   · Taxonomy evidence: The October xx.xx 2025 tender seeks microscopic traffic software that expressly includes pedestrian modeling. Only attributable pedestrian or crowd-software functionality is within this market; the complete mixed traffic procurement is not. ([find-tender.service.gov.uk](https://www.find-tender.service.gov.uk/Notice/xx.xx-2025/PDF))

   · Taxonomy evidence: The contracting authority is a municipal council seeking software for its own planning work, supporting a public-administration buyer role. The notice is intended procurement, not evidence of a completed award. ([find-tender.service.gov.uk](https://www.find-tender.service.gov.uk/Notice/xx.xx-2025/PDF))

   · Taxonomy evidence: The requested capability supports infrastructure optimization and future-development planning, providing buyer-side support for the capacity-and-space-planning objective. ([find-tender.service.gov.uk](https://www.find-tender.service.gov.uk/Notice/xx.xx-2025/PDF))

5. Software Licenses
   - Taxonomy evidence: The purchasing page updated September xx.xx 2026 retains both indefinite-duration and specified-period software licenses and separately describes maintenance products and basic functional support. This refresh supports the duration distinction and software-only boundary, not crowd-specific licensing shares. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
   - Taxonomy evidence: The official software-purchasing classification distinguishes perpetual and term licenses and separately includes maintenance and basic support. This establishes a general software duration framework, not crowd-market adoption or shares. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
   - Taxonomy evidence: Perpetual licensing is an expressly identified software-purchasing class. The record does not establish a particular crowd-software agreement or the consequences of maintenance nonrenewal. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
   - Taxonomy evidence: Perpetual licenses are identified as indefinite-duration licenses within the software-purchasing scope. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
   - Taxonomy evidence: Term licensing is expressly distinguished by a specified validity period. Invoice recurrence alone is not the classification criterion supplied by this record. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
   - Taxonomy evidence: Term licenses are identified as licenses valid for a specified period. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
6. OneGov
   - Taxonomy evidence: The page updated October xx.xx 2026 describes direct manufacturer relationships alongside access through value-added resellers. This confirms that upstream negotiation and the final transaction channel must not be treated as equivalent. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
   - Taxonomy evidence: The software-purchasing program describes manufacturer negotiations alongside purchasing through value-added resellers. Analytical implication: upstream negotiation and the final contracting channel must be distinguished. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
   - Taxonomy evidence: Manufacturer engagement is described but can coexist with reseller purchasing. It therefore does not establish publisher-to-customer seller-of-record status for a crowd-software transaction. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
   - Taxonomy evidence: Direct manufacturer relationships are described, but can coexist with reseller transactions; the page does not by itself establish direct publisher-to-customer crowd-software sales. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
   - Taxonomy evidence: Value-added resellers remain an expressly described software-purchasing path. This supports the intermediary concept without establishing crowd-market participation or revenue allocation for a particular reseller. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
   - Taxonomy evidence: Value-added resellers are expressly recognized as a purchasing path for software agreements. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))

7. Invitation for Bid - Attleboro Public Schools IP Video Surveillance System
   - Taxonomy evidence: The specification belongs to Attleboro Public Schools and includes people counting within a broader video-surveillance procurement. It supports an education operating context, not attribution of the whole security system to crowd software. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))
   - Taxonomy evidence: The specification describes analytics capabilities accessible in the cloud or on premises. Alternative capabilities and access wording do not establish simultaneous material application execution in both environments. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))
   - Taxonomy evidence: The municipal specification requests analytics-enabled video software with people counting and describes cloud or on-premises capabilities. It establishes procurement alternatives, not a confirmed hybrid crowd-software deployment. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))
   - Taxonomy evidence: The specification assigns work to a successful integrator separately from the manufacturer. This supports intermediary-led procurement relevance, but does not establish an award, qualifying software resale or software-only consideration. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))
   - Taxonomy evidence: The specification distinguishes the manufacturer from a successful integrator supplying the system. This supports an intermediary-led contracting path, while the qualifying crowd-software component and its consideration require separate attribution; no award is established here. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))
8. QtracVR Virtual Queuing System
   - Taxonomy evidence: The technology description distinguishes registration into a virtual physical-service queue from standing in line. Its historical decision date and version-specific decision matrix must not be interpreted as current blanket authorization, active deployment or a completed software purchase. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))
   - Taxonomy evidence: The government technology record describes software allowing patients to register in virtual queues without standing in line, with staff processing requests across service areas. This directly distinguishes physical virtual queuing from measurement-only queue analytics. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))
   - Taxonomy evidence: The described application records service registrations, unique call numbers and staff processing of requests. These support a transaction-record input category distinct from sensor-observed queue measurements. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))
   - Taxonomy evidence: The recorded application maintains service registrations, unique call numbers, queue requests and estimated waits. These are transactional queue-state records rather than observations from cameras or wireless sensors. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))
   - Taxonomy evidence: The description concerns patient service requests and multiple service areas, supporting the healthcare operating context without establishing software-only revenue or present approval status. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))

9. Crowd monitoring sensor types

- Taxonomy evidence: The research project's published sensor-family list distinguishes automatic counting, Wi-Fi/Bluetooth, GPS or smartphone location, and RFID sensing. It independently supports recognizable information-source distinctions, not the complete commercial partition or paid adoption. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))
- Taxonomy evidence: The research consortium distinguishes automatic detection, Wi-Fi/Bluetooth sensing, GPS/smartphone location and RFID sensing as crowd-monitoring inputs. This supports recognizable source-family distinctions without prescribing the response's complete allocation rules or establishing commercial readiness. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))
- Taxonomy evidence: Wi-Fi, Bluetooth and RFID sensing are explicitly identified separately from GPS and smartphone location sources. The retained transaction-versus-tracking RFID rule remains an analytical allocation convention. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))
- Taxonomy evidence: Wi-Fi, Bluetooth and RFID are explicitly identified as sensing families for crowd-monitoring research. Their identification does not establish paid deployments or global market shares. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))
- Taxonomy evidence: GPS trackers and smartphone applications supplying location information are an explicit source family, independently supporting separation from venue network-signal sensing. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))

10. Monitor the crowd

- Taxonomy evidence: The page identifies an April xx.xx 2025 update and distinguishes overall numbers, distribution and emerging crowd problems. It supports the monitoring functional rationale, not a requirement to buy software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: The guidance distinguishes monitoring venue totals, crowd distribution and developing crowd problems. It supports linked counting, occupancy and distribution functions, not a software-sales partition. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: The guidance recognizes staff observations and manual counters as information sources. This supports human-reported inputs but does not establish currently purchased software principally dependent on them. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: Hand counters, field-staff observations and social-media monitoring are recognized crowd-information sources. This establishes the information need, not current paid human-report-led software contracts. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: Thermal counting and people-counting sensors are named, but the page does not resolve whether a particular thermal implementation produces imagery. Ambiguous thermal products therefore require source-provenance evidence rather than automatic assignment. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: People-counting sensors and thermal counting are named monitoring inputs. This source does not establish whether a particular thermal implementation is imaging or non-imaging. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: CCTV cameras and drones are identified as sources of crowd-movement and distribution information. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: Turnstiles and computer-chipped tickets or wristbands are identified as counting-system inputs at entry and exit points. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: HSE identifies crowd-number estimation and crowd-distribution monitoring as inputs to maintaining safe conditions. This establishes the safety decision need, not a requirement to purchase software or proof of supplier revenue. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

11. In-Store Analytics - Pre-Approval Onboarding Guide

- Taxonomy evidence: Customer Queue Insights is a preferred, not mandatory, solution-program question covering queue lengths and waiting times. It establishes official recognition of retail queue functionality, not universal requirements or an awarded customer contract. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))
- Taxonomy evidence: IMDA's retail solution requirements explicitly include queue-length and waiting-time insights for optimizing checkout processes. This is category-level retail demand evidence, not a disclosed customer award. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))
- Taxonomy evidence: The preferred queue-insights question explicitly links the information to checkout-process optimization, supporting an efficiency objective distinct from the input technology. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))
- Taxonomy evidence: The Customer Queue Insights requirement links queue information to checkout-process optimization, supporting an efficiency objective. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))
- Taxonomy evidence: Staff allocation is separately identified as an intended use of queue-length and waiting-time insights. Its presence supports a distinct resource-allocation objective, not a measured purchase allocation. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))
- Taxonomy evidence: The same requirement separately identifies staff allocation as an intended use of queue and waiting-time information. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))

12. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022

- Taxonomy evidence: The April xx.xx 2022 authorization request combines software, equipment, vendor services and license maintenance, with software and vendor services grouped together. It does not establish software-only value, a completed deployment or eventual entitlement terms. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: The April 2022 memorandum requests procurement encompassing software licenses and maintenance for passenger-flow measurements, reporting and emerging-issue alerts. It establishes a buyer requirement, not proof of completed installation or software-only expenditure. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: The request identifies possible wireless technology, smartphone location services or roadway cameras, while requiring consolidated measurements. Alternative candidate sources and consolidation do not prove substantive implemented fusion. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: The proposed scope gathers and consolidates flow measurements from new and existing systems. It supports multisource integration as a buyer requirement without establishing the eventual feeds or their algorithmic fusion. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: The proposed measurement paths span roadways and terminal or concourse areas. This supports combined physical coverage as a buyer requirement, not confirmation of one inseparable licensed module. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: Combined roadway and terminal coverage supports the need for an Indoor and Outdoor category. A finalized inseparable software entitlement, completed deployment and software-only value are not established by this authorization request. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: Recurring software-license and maintenance charges are combined. Their recurrence does not establish whether underlying application-use rights are perpetual or expiring. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: Recurring software license and maintenance fees are combined in the request. The underlying application-use expiry is not stated, so recurring expenditure alone cannot establish Term Licenses. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: Cameras are explicitly contemplated as a passenger-flow information source for the proposed licensed system. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: Existing airport wireless technology is explicitly contemplated as a passenger-flow information source. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: Smartphone location services are identified separately from airport wireless infrastructure and cameras among the possible information sources. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: The April xx.xx 2022 Port of Seattle memorandum requests procurement authority for passenger-flow measurement software, equipment, services, and maintenance for airport operations. It identifies airport operating demand, while its combined expenditure cannot be treated wholly as software revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Taxonomy evidence: Passenger journey-time measurements are linked to Aviation Customer Experience objectives, supporting a visitor-experience application distinct from the underlying measurement technology. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

13. Crowd controls inside the venue

- Taxonomy evidence: The guidance separately identifies information for visitors and staff command structures. Visitor-facing communication is therefore a distinct management requirement, although the guidance does not establish a purchased software entitlement. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Taxonomy evidence: The guidance identifies information and directions to visitors as crowd-management responsibilities, independently establishing demand for visitor-facing crowd communication rather than staff coordination alone. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Taxonomy evidence: The control-point responsibilities include sharing crowd information, coordinating staff responses and coordinating external agencies. These support staff-facing crowd coordination as distinct from visitor messaging; they do not make general incident software wholly in scope. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Taxonomy evidence: A central control point is described as coordinating information and responses among crowd-management staff and external bodies. This supports a distinct staff-facing coordination requirement, not proof that all general incident software belongs in the market. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

14. Planning for incidents and emergencies

- Taxonomy evidence: The guidance updated January xx.xx 2026 expressly identifies emergency crowd management, evacuation and incident control. This refresh supports distinguishing emergency-specific objectives from routine crowd safety without treating the guidance as software-adoption evidence. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))
- Taxonomy evidence: HSE distinguishes emergency planning, evacuation, incident control, and emergency-service coordination from normal event operation. These are emergency-specific business requirements; the guidance does not itself establish commercial software adoption. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))
- Taxonomy evidence: The guidance distinguishes event organizers and fixed-premises venue management from emergency services. It supports different operating roles but does not establish their respective software entitlements or expenditure. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))
- Taxonomy evidence: The guidance assigns responsibilities to event organizers and fixed-premises venue management and identifies their interfaces with emergency services. This supports an event-operator buyer role distinct from public emergency agencies. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))

15. RFP for procurement of Queue Management Solution

- Taxonomy evidence: The bank's procurement scope explicitly seeks Queue Management Software for managing branch crowds, including token issuance and expected waiting information. The procurement combines software with implementation and maintenance, so its full contract value cannot be treated as software revenue. ([sbi.bank.in](https://sbi.bank.in/webfiles/uploads/files_2324/xx.xx-RFP_QMS%20Software_Solution_Ver-xx.xx.2_finalv2.pdf))
- Taxonomy evidence: State Bank of India's March xx.xx 2024 RFP expressly proposes procuring queue-management software to manage crowds at branches. It establishes a financial institution as the intended software customer, not merely a payer or distribution partner. ([sbi.bank.in](https://sbi.bank.in/webfiles/uploads/files_2324/xx.xx-RFP_QMS%20Software_Solution_Ver-xx.xx.2_finalv2.pdf))
- Taxonomy evidence: The RFP identifies a software deliverable for physical branch crowd management, supporting an operational queue application. It is a solicitation, not proof of a completed deployment. ([sbi.bank.in](https://sbi.bank.in/webfiles/uploads/files_2324/xx.xx-RFP_QMS%20Software_Solution_Ver-xx.xx.2_finalv2.pdf))

16. Put crowd controls in place

    - Taxonomy evidence: The guidance treats entry, circulation and dispersal as distinct crowd-control phases and discusses arrangements when arrivals may exceed safe venue capacity. It supports capacity-constrained admission as a distinct management requirement, but does not independently establish a purchased software category or its value. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-controls.htm))

17. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

    - Taxonomy evidence: The April xx.xx 2024 government publication reports Network Rail's acquisition of LiDAR-based crowd-monitoring technology and describes tracking units, cameras and a software viewer. It substantiates commercially acquired range-sensing-linked crowd software, while leaving software revenue within the mixed system unallocated. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

    - Taxonomy evidence: The acquired system's software viewer provides personnel with crowd updates and analysis, supporting monitoring software as a functional deliverable distinct from the underlying sensing equipment. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

    - Taxonomy evidence: The government describes a commercial crowd-monitoring system sending data to cloud servers for analysis and staff alerts, establishing externally hosted crowd-application functionality. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

    - Taxonomy evidence: Cloud-based analysis and alert generation support a hosted analytics component category. The account does not establish that every system function is hosted or isolate software-only consideration. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

18. Capturing engagement numbers - strand 1 report

    - Taxonomy evidence: The report published March xx.xx 2026 distinguishes mobile-app geolocation from deployable visual and signal sensing. These are research-program source distinctions, not worldwide commercial shares or evidence of 2025 sales. ([gov.uk](https://www.gov.uk/government/publications/capturing-engagement-numbers-strand-xx.xx-report/capturing-engagement-numbers-strand-xx.xx-report))

    - Taxonomy evidence: The report describes mobile applications supplying device-location information and distinguishes this from locally deployed crowd-sensing equipment. ([gov.uk](https://www.gov.uk/government/publications/capturing-engagement-numbers-strand-xx.xx-report/capturing-engagement-numbers-strand-xx.xx-report))

    - Taxonomy evidence: Wi-Fi and radio-signal sensing are discussed as attendance-information sources but deprioritized for this research program because of deployment and accuracy concerns. The finding is not interpreted as absence of commercial crowd-density software using those sources. ([gov.uk](https://www.gov.uk/government/publications/capturing-engagement-numbers-strand-xx.xx-report/capturing-engagement-numbers-strand-xx.xx-report))

19. Enhancing crowd monitoring system functionality through data fusion: Estimating flow rate from wi-fi traces and automated counting system data

    - Taxonomy evidence: The peer-reviewed 2020 study combines Wi-Fi traces and automated counting information from a large event to estimate pedestrian flow. It establishes substantive data fusion as distinct from single-source monitoring, not current worldwide software licensing or adoption. ([research.tudelft.nl](https://research.tudelft.nl/en/publications/enhancing-crowd-monitoring-system-functionality-through-data-fusi/))

20. A holistic, scenario-independent, situation-awareness and guidance system for sustaining the Active Evacuation Route for large crowds - Final Report Summary

    · Taxonomy evidence: The final report for the project completed May xx.xx 2017 describes an integrated platform combining crowd monitoring, simulation, operational visualization, communication and guidance. It establishes a cross-functional system architecture and demonstrations, not a currently sold inseparable software suite. ([cordis.europa.eu](https://cordis.europa.eu/project/id/xx.xx/reporting/it))

    · Taxonomy evidence: The demonstrated common operational picture connects decision makers, stewards and first responders, supporting crowd-specific coordination functionality distinct from visitor messaging. ([cordis.europa.eu](https://cordis.europa.eu/project/id/xx.xx/reporting/it))

    · Taxonomy evidence: The spectator application allows users to report incidents into the common operational picture. This supports human reports as a software information source in a demonstration, not proof of a paid predominantly human-report-led license. ([cordis.europa.eu](https://cordis.europa.eu/project/id/xx.xx/reporting/it))

21. Crowd Control | Omnivex

    · Taxonomy evidence: The supplier's inspected software catalog markets crowd-control communication through occupancy information, congestion-aware directions, wayfinding and emergency messages. This corroborates its own commercially offered guidance functionality, independently aligned with crowd-safety communication requirements; it does not make all digital signage in scope. ([omnivex.com](https://www.omnivex.com/solutions/applications/crowd-control))

22. AliudQ - One Platform for Visitor Flow, Communication and Insights

    · Taxonomy evidence: The inspected IAMP product presentation combines crowd functions, digital signage and analytics on a shared data model and offers standalone or combined solutions. It corroborates marketed integration, not contractual inseparability or the response's full market partition. (aliudq.com)

    · Taxonomy evidence: The presentation advertises operational task distribution alongside crowd-flow, capacity and waiting information. This supports marketed coordination functionality within that platform, but does not establish a separately priced crowd-coordination license or completed customer purchase. (aliudq.com)

23. Safety Essentials

    · Taxonomy evidence: The sports-ground guidance describes control-point responsibilities for monitoring spectator numbers, crowd disorder, safety, and incident response. It establishes sports-ground operating demand, not a separately attributable software purchase. ([sgsa.org.uk](https://sgsa.org.uk/wp-content/uploads/2023/xx.xx/Safety-Essentials.pdf))

    · Taxonomy evidence: The control-point functions include monitoring spectator ingress and crowd disorder, supporting routine crowd-safety and security objectives. ([sgsa.org.uk](https://sgsa.org.uk/wp-content/uploads/2023/xx.xx/Safety-Essentials.pdf))

24. Incorporating Technologies into Airport In-Terminal Concessions Programs: A Primer (2025)
    - Taxonomy evidence: The 2025 research distinguishes customer-service, queue, workforce, and commercial uses of passenger-flow information. These support distinct demand objectives, but not an official seven-category taxonomy.
    ([[nationalacademies.org]](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
    - Taxonomy evidence: The report describes using localized passenger-flow information with sales activity to understand commercial capture and inform trading decisions. Inclusion here is restricted analytically to identifiable crowd-operational software, not advertising-only analytics.
    ([[nationalacademies.org]](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
    - Taxonomy evidence: Predictive passenger-flow information can inform concession staffing, stocking schedules, and operating hours, supporting resource-allocation objectives.
    ([[nationalacademies.org]](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
    - Taxonomy evidence: The research identifies reducing queues and bottlenecks as operational uses of passenger-flow information.
    ([[nationalacademies.org]](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
    - Taxonomy evidence: It separately identifies passengers' demand for queue-length information, supporting visitor-facing journey predictability.
    ([[nationalacademies.org]](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
    - Taxonomy evidence: Airport concession operators are identified as users of passenger-flow information for their own business planning, distinct from airport operating authorities.
    ([[nationalacademies.org]](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
25. Hotel Productivity Benchmarking
    - Taxonomy evidence: The intergovernmental study identifies crowd-management tools within hotel food-and-beverage operations and discusses operational use of queue analytics. Its surveyed-city findings are not treated as Global adoption rates.
    ([[apo-tokyo.org]](https://www.apo-tokyo.org/wp-content/uploads/2023/xx.xx/Hotel-Productivity-Benchmarking.pdf))
    - Taxonomy evidence: The study describes redirecting guests between outlets to improve physical queue management, supporting the flow-efficiency application.
    ([[apo-tokyo.org]](https://www.apo-tokyo.org/wp-content/uploads/2023/xx.xx/Hotel-Productivity-Benchmarking.pdf))
    - Taxonomy evidence: It identifies deploying additional staff in response to outlet queue patterns as a crowd-management use, supporting the resource-optimization application.
    ([[apo-tokyo.org]](https://www.apo-tokyo.org/wp-content/uploads/2023/xx.xx/Hotel-Productivity-Benchmarking.pdf))
26. Space Optimization Pilot Programs | Facilities
    - Taxonomy evidence: UCLA describes a campus occupancy pilot and planned dashboards reporting building, floor, and zone use. This establishes an institutional operating context, not confirmed commercial software licensing or a completed broader rollout.
    ([[facilities.ucla.edu]](https://facilities.ucla.edu/programs/space-occupancy))
    - Taxonomy evidence: The program identifies reallocation of underused space as an intended use of occupancy information, supporting capacity and space planning. Energy-only applications described on the page are outside the retained crowd-software boundary.
    ([[facilities.ucla.edu]](https://facilities.ucla.edu/programs/space-occupancy))
    - Taxonomy evidence: Flexible deployment of custodial teams to higher-traffic locations is an explicitly identified use, supporting occupancy-informed staffing and service-resource decisions.
    ([[facilities.ucla.edu]](https://facilities.ucla.edu/programs/space-occupancy))

27. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE

    · Taxonomy evidence: The invitation identifies Thomson Hospitals Sdn Bhd as the owner seeking an appointment and queue-management system for hospital use. Its stated objectives include patient flow and real-time queue management; the invitation does not establish an award. ([tmclife.com](https://www.tmclife.com/tender/supply-delivery-installation-testing-commissioning-of-an-appointment-and-queue-management-system-aqms/))

    · Taxonomy evidence: The requested system is intended to improve patient flow and service efficiency, supporting a physical-flow application rather than appointment scheduling alone. ([tmclife.com](https://www.tmclife.com/tender/supply-delivery-installation-testing-commissioning-of-an-appointment-and-queue-management-system-aqms/))

28. Navigating a post circuit breaker Singapore with data driven tech

    · Taxonomy evidence: GovTech describes a government-developed service combining participating operators' crowd-level information for public use. It establishes a public coordination role, but not an externally purchased commercial software entitlement. ([tech.gov.sg](https://www.tech.gov.sg/technews/navigating-a-post-circuit-breaker-sg))

    · Taxonomy evidence: The crowd-information service was intended to help people choose less crowded places or visiting times, supporting crowd-aware visitor guidance. Its historical pandemic context is not treated as current regulatory demand. ([tech.gov.sg](https://www.tech.gov.sg/technews/navigating-a-post-circuit-breaker-sg))

29. Safe Distance @Parks: How AI replaced eye power for crowd counting

    · Taxonomy evidence: GovTech's October xx.xx 2021 account describes an application supporting crowd-level assessment in public parks. It establishes the recreation setting, not commercial software purchasing or present deployment continuity. ([tech.gov.sg](https://www.tech.gov.sg/technews/safe-distance-at-nparks/))

    · Taxonomy evidence: The public-facing park crowd-information application supports visitor decisions about crowded recreation spaces, providing an additional setting for the visitor-guidance application. ([tech.gov.sg](https://www.tech.gov.sg/technews/safe-distance-at-nparks/))

30. ST0859/AP01

    · Taxonomy evidence: The official fire-safety-engineer assessment plan includes using and evaluating evacuation-modeling software in engineering design work. It supports a professional-user role, not a specific software purchase or resale arrangement. ([skillsengland.education.gov.uk](https://skillsengland.education.gov.uk/media/xx.xx/st0859_fire-safety-engineer_l6_epa_cycle_30_for-publishing.pdf))

    · Taxonomy evidence: Evacuation modeling is identified as part of fire-safety engineering assessment, supporting an emergency-preparedness application distinct from routine circulation efficiency. ([skillsengland.education.gov.uk](https://skillsengland.education.gov.uk/media/xx.xx/st0859_fire-safety-engineer_l6_epa_cycle_30_for-publishing.pdf))

31. The NIST Definition of Cloud Computing

    · Taxonomy evidence: The standard distinguishes cloud service models from cloud deployment models and states that private cloud infrastructure can exist on or off premises. Analytical implication: cloud terminology alone cannot establish whether a crowd application is locally installed or externally hosted. ([nvlpubs.nist.gov](https://nvlpubs.nist.gov/nistpubs/legacy/sp/nistspecialpublication800-xx.xx.pdf))

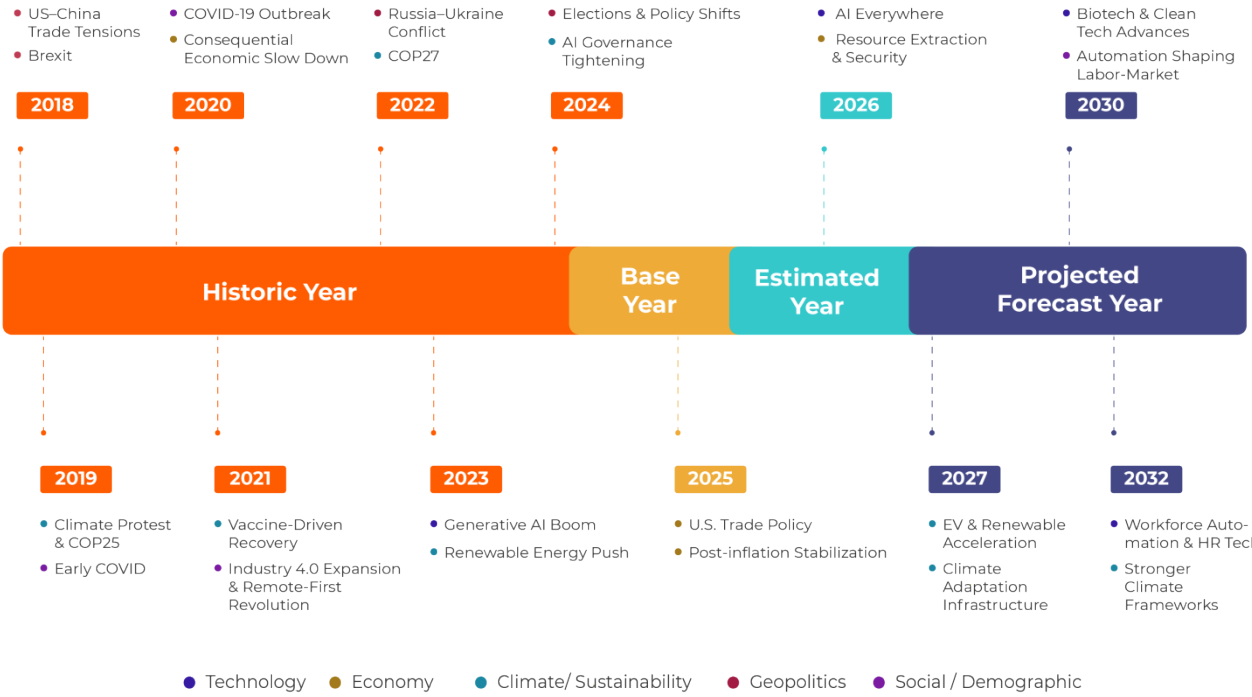
    · Taxonomy evidence: Its hybrid-cloud definition concerns connected distinct cloud infrastructures; it does not directly verify this taxonomy's broader local-plus-external Hybrid category. ([nvlpubs.nist.gov](https://nvlpubs.nist.gov/nistpubs/legacy/sp/nistspecialpublication800-xx.xx.pdf))

32. Acquisition letter MV-2024-01: Guidance on payment for software licenses delivered via SaaS
    - Taxonomy evidence: The guidance treats SaaS access duration, pricing units and payment timing as distinguishable contractual attributes. It supports keeping License Term independent of hosting and billing cadence.
    ([gsa.gov](https://www.gsa.gov/policy-regulations/policy/acquisition-policy/acquisition-policy-library-and-resources/mv202401))
    - Taxonomy evidence: The purchasing criteria describe continuous software access over a negotiated fixed term, with seat, unit or subscription pricing. This supports a term-access class without establishing a particular crowd-software agreement.
    ([gsa.gov](https://www.gsa.gov/policy-regulations/policy/acquisition-policy/acquisition-policy-library-and-resources/mv202401))
33. Procurement of a Turnkey Solution Comprising E-Ticketing, AI Integratable IP Cameras, Fleet Management System, Safari Animal Webcam, IT Infrastructure and Data Center for Safari Zoo Lahore
    - Taxonomy evidence: The public attraction's turnkey procurement includes queue-management software and analytics requirements with on-premises deployment. It establishes a buyer requirement rather than a completed implementation.
    ([pwl.gop.pk](https://pwl.gop.pk/wp-content/uploads/2024/xx.xx/PROCUREMENT-OF-TURNKEY-SOLUTION-FOR-SAFARI-ZOO-LAHORE.pdf))
    - Taxonomy evidence: The analytics specifications explicitly identify an on-premises installation option, supporting a locally installed software category. The mixed procurement does not isolate crowd-software revenue.
    ([pwl.gop.pk](https://pwl.gop.pk/wp-content/uploads/2024/xx.xx/PROCUREMENT-OF-TURNKEY-SOLUTION-FOR-SAFARI-ZOO-LAHORE.pdf))
34. Assess crowd safety risks and identify hazards
    - Taxonomy evidence: Crowd-risk guidance identifies venue and site characteristics as relevant to capacity and movement assessment, separately recognizing urban streets and open spaces. This supports a physical-coverage distinction independent of software hosting.
    ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
    - Taxonomy evidence: The guidance specifically addresses outdoor spaces with less-defined event boundaries and zone-based capacity assessment. Applying that demand distinction to software coverage is an analytical adaptation, not a published market segment estimate.
    ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
35. Standards and Guidance - Life Safety First: Event Safety Alliance
    - Taxonomy evidence: The standards program includes crowd management and expressly includes indoor and outdoor events within its weather-preparedness standard. It establishes recognized event settings, not a software-market partition.
    ([event-safety-alliance.squarespace.com](https://event-safety-alliance.squarespace.com/standards-guidance-xx.xx))
    - Taxonomy evidence: Indoor events are explicitly within the standards program's event-safety scope, providing demand-context support for an indoor software-coverage category.
    ([event-safety-alliance.squarespace.com](https://event-safety-alliance.squarespace.com/standards-guidance-xx.xx))

1.4. Years Considered for the Study

The study designates 2024 as the historical year, 2025 as the base year, 2026 as the estimated year, and 2032 as the terminal forecast year. These roles distinguish historical context, the reference period, estimated-year interpretation, and the forward-looking horizon.

Figure 1. Global Crowd Management Software Market, Years Considered for the Study



1.5. Currency Considered for the Study

The reporting currency is United States dollars (USD), and monetary values use an absolute-value scale.

1.6. Language Considered for the Study

The publication language is American English.

1.7. Key Stakeholders

- Software publishers and product owners: decisions about functional scope, integrated versus focused offerings, licensing rights, interoperability commitments, and responsibility for delivery through direct or indirect relationships.
- Buyer sponsors and procurement teams across the accepted End User sectors: decisions about qualification, contractual access, benefit evidence, support obligations, and the suitability of purchasing alternatives.
- Venue, event, site, and service-operation managers: decisions about how monitoring, queues, admission, guidance, and coordination software fit assigned responsibilities and operational continuity requirements.
- Planning, transport, design, and crowd-safety professionals: decisions about the commercial suitability of planning and simulation software for evaluating proposed spaces and crowd-management arrangements.

- Information technology, cybersecurity, privacy, and data-governance teams: decisions about deployment approval, system compatibility, access permissions, data responsibilities, portability, and supplier obligations.
- Integrators, resellers, and other channel partners: decisions about authorization to offer software, contractual scope, integration responsibility, customer ownership, and continuing service commitments.
- Sensor, connectivity, and data providers: exposure to the information dependencies of in-scope software and decisions about access rights, continuity, and commercial interfaces without treating their entire businesses as software offerings.
- Public authorities and safety, security, and regulatory bodies: decisions concerning purchasing eligibility, applicable obligations, accountability, and acceptable use within their jurisdictions.
- Visitors, service users, employees, and other affected people: exposure to admission, queueing, guidance, communication, accessibility, and data-use choices embedded in the buyer's software decision.
- Investors and corporate-development teams: decisions about the commercial rights, buyer dependencies, channel relationships, and evidence needed to distinguish an established offering from a proposed capability.

2. Research Methodology

2.1. Introduction

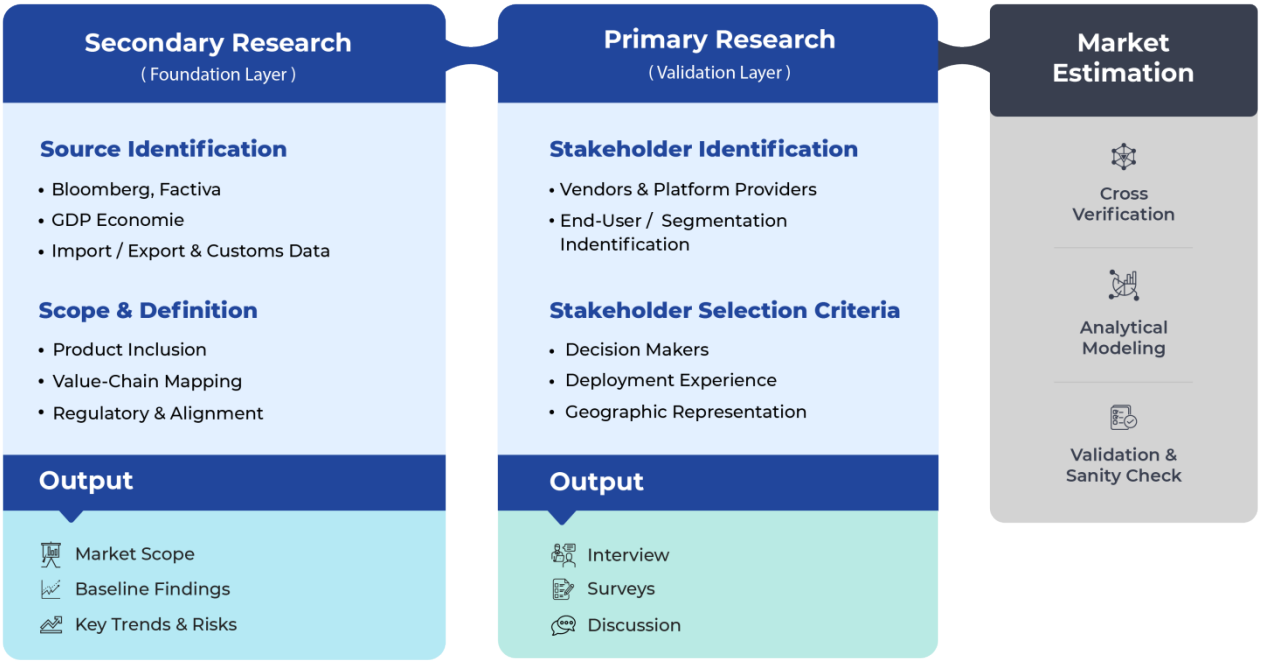
The study frames Crowd Management Software as a set of software functions serving planning, operational, visitor, and commercial decisions in physical environments. Its approach connects each business question to evidence capable of establishing the relevant offering, right, purchasing condition, or service responsibility. Observed commercial facts are distinguished from interpretations about adoption, buyer incentives, switching, and competitive alternatives. The qualitative challenge layer informs these explanations without substituting for independent numerical support.

2.2. Research Design

The research design separates functional classification, commercial participation, buyer qualification, and demonstrated outcomes. An offering must be understood through its documented crowd-management role rather than assigned capabilities solely from its supplier's name, a broad technology label, or an adjacent business activity. Comparisons then require a defined buyer task, operating environment, deployment arrangement, license term, and sales relationship.

Evidence is matched to the proposition it can establish. A product description addresses an advertised function; a contract or buyer record addresses a specified purchasing relationship; and a legal or regulatory record addresses the rights or conditions within its jurisdiction. These roles guide interpretation without treating different kinds of records as interchangeable confirmation.

Figure 2. Global Crowd Management Software Market, Research Design



2.2.1. Primary Research

The analyst team conducted primary research as a qualitative challenge layer for market definition, segmentation, demand conditions, adoption barriers, and competitive interpretation. This work tested analytical assumptions and sharpened explanations of market mechanisms without serving as standalone support for numerical estimates.

The qualitative challenge layer is evaluated alongside secondary evidence within the accepted market scope. It informs conditional market explanations and hypotheses for subsequent quantitative analysis. Numerical estimates require their own supporting evidence, and a forecast derived from a qualitative assumption does not independently validate that assumption. Final interpretation must reconcile the qualitative findings with the completed quantitative results.

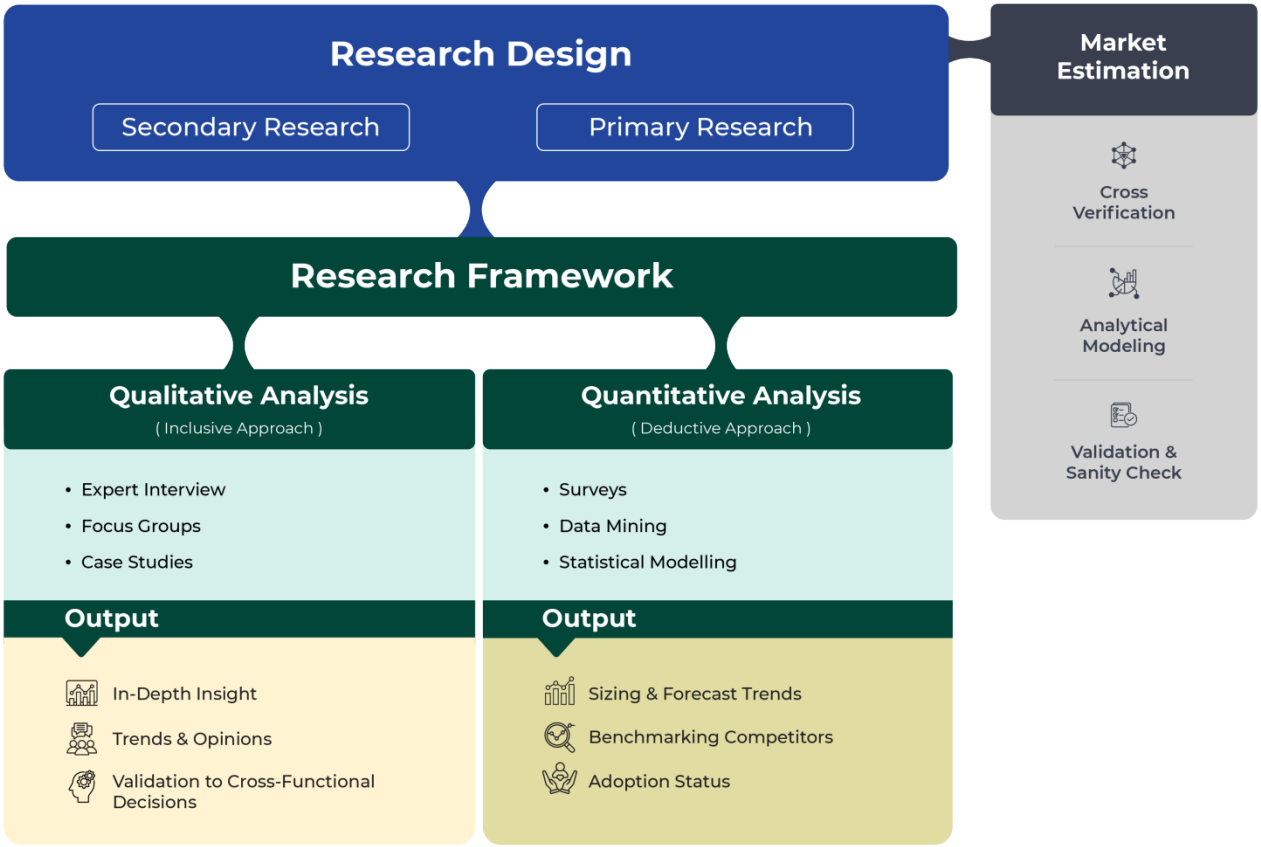
2.2.2. Secondary Research

Secondary evidence is assessed according to its authority over the specific business fact. Official portfolios and product materials are relevant to advertised functionality and stated delivery commitments; mandatory filings to disclosed business relationships and financial facts within their stated scope; ownership and licensing records to commercial rights; and public buyer documents to purchasing conditions or defined awards. Legal and regulatory materials address jurisdiction-specific requirements. The effective period, contractual scope, and underlying authority matter more than a document's general relevance to crowd technology.

2.3. Research Framework

The framework links the accepted taxonomy to an offering-level competitive universe, a defined commercial relationship, and the buyer decision under consideration. Functional coverage establishes what is being compared; data dependencies and applications explain its intended role; and the remaining axes locate that role within a purchasing and operating context. Competitive interpretation requires evidence of the relevant offering or business right, while measurement requires a compatible economic boundary. This prevents adjacent technology participation or an expert's affiliation from becoming an unsupported claim of supplier capability.

Figure 3. Global Crowd Management Software Market, Research Framework



2.3.1. Qualitative Analysis

Qualitative analysis centers on the buyer's crowd-management decision: what must be planned, monitored, coordinated, or communicated; who acts on the software's output; and which data, organizational, and contractual dependencies affect that action. Planning suitability, operational usability, switching effort, service responsibility, and decision accountability are separate dimensions of comparison. Intended safety, flow, staffing, visitor-experience, or commercial benefits are evaluated as conditional propositions rather than guaranteed consequences of a feature label.

2.3.2. Quantitative Analysis

Quantitative interpretation uses the Global boundary, the designated study-year roles, and absolute monetary values reported in USD. A numerical disclosure requires an identifiable commercial subject and period before it can inform a comparison. Software Offering, Crowd Data Source, Application, End User, Deployment Model, License Term, Sales Channel, and Operating Environment are separate views of the same market, not amounts to be added together. License duration and hosting arrangements describe commercial characteristics; neither alone establishes how a monetary disclosure should be interpreted.

2.4. Market Size Estimation

The measurement subject is in-scope Crowd Management Software across the Global market, not all expenditure associated with managing crowds. Functional inclusion establishes which software activities belong in the study; it does not establish that every module, application, or data-source category has a separately measurable economic contribution. Any monetary interpretation requires evidence that distinguishes the relevant software activity from adjacent hardware, connectivity, professional services, and underlying venue or event operations, without assuming an unstated attribution basis.

2.4.1. Top-Down Approach

The top-down role is to test whether an aggregate disclosure has a boundary compatible with Crowd Management Software. Broader descriptions of surveillance, event technology, ticketing, or facility systems cannot stand in for the accepted software market merely because they contain related functions. Any allocation from a broader disclosure requires independent support for the in-scope activity; thematic similarity does not justify a presumed proportion or establish comparability across the accepted categories.

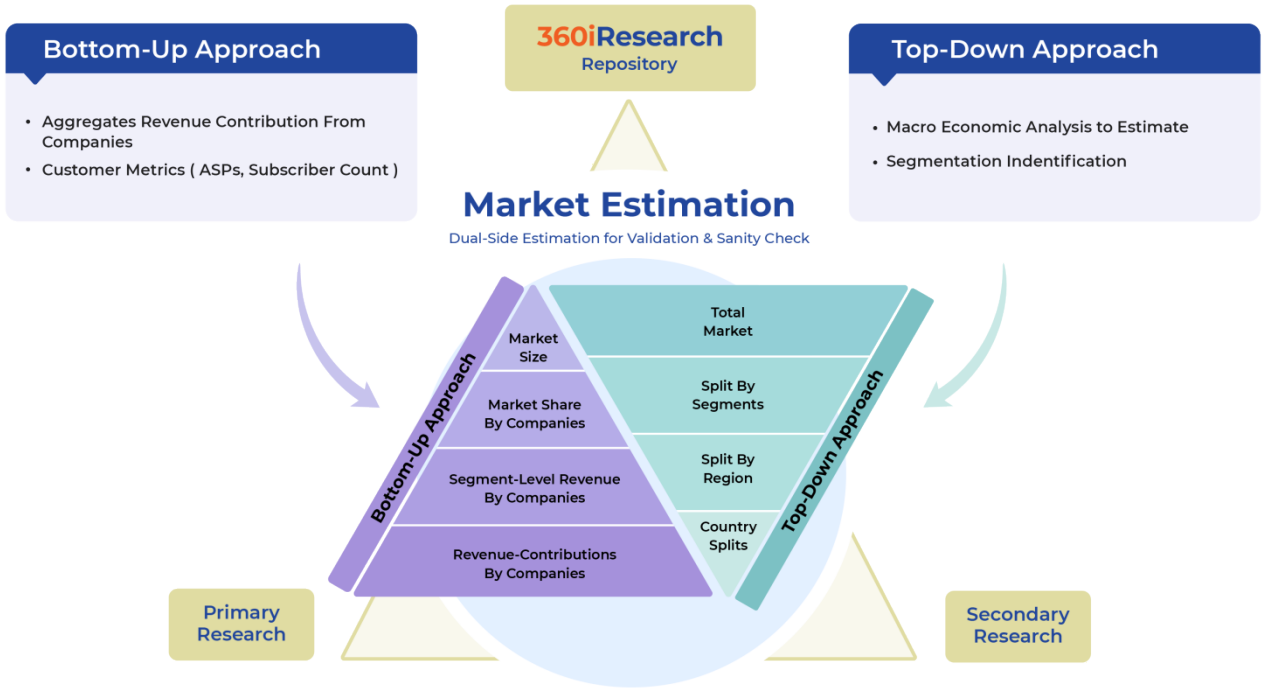
2.4.2. Bottom-Up Approach

The bottom-up role is to examine whether offering-level business evidence corresponds to the accepted software categories and commercial relationships. Focused applications, integrated suites, and channel-supplied solutions require distinguishable boundaries before they can contribute to an aggregate interpretation. A publisher's portfolio, a reseller's description, and a buyer's contract may describe the same software relationship rather than separate economic activity. Offering-level documentation therefore supports classification and overlap checks without, by itself, establishing a monetary contribution.

2.5. Data Triangulation

Triangulation concerns agreement about the same offering, geography, period, and commercial relationship. A portfolio description, a partner announcement, and a buyer award address different propositions and should corroborate only the facts their scopes overlap. Multiple publications derived from one underlying statement do not create independent confirmation. Where commercial records differ, the relevant authority and effective scope govern interpretation; unresolved differences must remain attached to the affected conclusion rather than being concealed by apparent agreement.

Figure 4. Global Crowd Management Software Market, Data Triangulation



2.6. Research Outcomes

The study is intended to support software portfolio positioning, buyer shortlisting, procurement diligence, licensing comparisons, and channel evaluation within Crowd Management Software. Decision support should identify the function being purchased, the relevant buyer and operating context, the commercial rights and responsibilities involved, and the conditions that could change a conclusion. Product availability, contractual access, and demonstrated buyer outcomes remain distinct questions; evidence supporting one should not be presented as proof of the others.

2.7. Research Assumptions

- Functional comparability requires a matched buyer task. Crowd Planning and Simulation Software, Crowd Monitoring and Analytics Software, and Integrated Crowd Management Suites are not assumed to be substitutes merely because all participate in the study.
- Data-dependent adoption is conditional on the buyer and supplier having appropriate access and use rights for the intended setting. Inclusion of a Crowd Data Source category does not establish those rights for a particular offering or jurisdiction.
- A single suite or contract may support several software functions and applications. Classification across the accepted axes does not imply separate purchases or independently attributable economic activity.

- Deployment Model and License Term are independent classifications. Hosted delivery is not assigned to Term Licenses solely because of hosting, and On-Premises delivery is not assigned to Perpetual Licenses without contractual support.
- Forward-looking interpretation is conditional on the commercial access, data permissions, integration responsibilities, and buyer requirements relevant to the proposed offering. Continuation of these conditions is a proposition to assess, not an assured outcome.

2.8. Research Limitations

- Broad descriptions of video analytics, ticketing, facilities software, or integrated suites do not by themselves isolate the crowd-management function. Like-for-like comparison requires offering-level scope rather than treating an entire adjacent business as equivalent.
- A data-source label does not establish compatibility with a buyer's systems, permission to reuse the information, or suitability across every operating environment. These conditions require verification for the proposed deployment before procurement.
- Software functionality alone does not demonstrate improved crowd safety, queue performance, staffing efficiency, visitor experience, or commercial outcomes. Such conclusions require evidence relevant to the buyer's setting, responsibilities, and intended use.
- Global scope does not establish local commercial availability, procurement eligibility, regulatory acceptance, or enforceable support commitments. Market-access conclusions must remain specific to the proposed supplier-buyer relationship and jurisdiction.

3. Executive Summary

3.1. Introduction

The Global Crowd Management Software market serves distinct decisions about physical spaces rather than a single interchangeable dashboard requirement. Bentley Systems' LEGION addresses planning before implementation; Qmatic's queue and appointment functions address arrival-to-service coordination. Monitoring, admission, visitor guidance, staff coordination, and Integrated Crowd Management Suites coexist with these offerings but are not automatically substitutes. Buyers should define the operating decision before comparing portfolio breadth.

Information coverage creates a second purchasing boundary. Crowd Connected's app-derived analytics and Connect&GO's admission records observe different activity and populations. Similar displays do not establish equivalent occupancy coverage. A focused application can fit a bounded task, while an integrated purchase is defensible only when its additional functions and delivery responsibilities match the buyer's requirement.

Sources & Evidence

1. LEGION | Bentley Systems
   · Bentley markets LEGION for pedestrian modeling and comparison of design and operating alternatives before implementation, supporting the distinction between planning and ongoing arrival management. ([bentley.com](https://www.bentley.com/products/legion/))
2. Qmatic | FAQs
   · Qmatic describes queue, appointment, virtual-queuing, messaging, and reporting functions, establishing an arrival-to-service proposition distinct from pedestrian design assessment. ([qmatic.com](https://www.qmatic.com/resources/faq))
3. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   · Crowd Connected describes location analytics operating through the customer's mobile app. That channel does not independently establish observation of every visitor. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
4. Smart Access Control | Connect&GO
   · Connect&GO distinguishes scans, unique tickets scanned, admissions, ticket types, and access points in its reporting. Admission activity therefore has a defined transaction boundary rather than established equivalence with unrestricted occupancy observation. ([connectngo.com](https://www.connectngo.com/features/access-control))

3.2. CXO Perspective

Capital owners should fund an accountable operating change, not software access alone. The Port of Seattle's 2021 virtual-queue proposal linked operational and technology sponsorship with implementation and recurring responsibilities; Qmatic Concierge illustrates an arrival service that still involves reception staff. Management must retain authority over receiving-service resources, while technology leaders secure interfaces, licensed functions, and acceptance. Where EU deployments process identifiable video, information-governance owners must establish the intended lawful use before commitment.

Incumbents can compete by extending an established relationship, but Milestone Systems' BriefCam licensing makes the required live-response entitlement an explicit purchasing condition. Entrants face a different gate: State Bank of India's 2024 clarification retained bidder-specific queue-management experience despite a proposed partner-based argument. Suppliers should verify the actual contracting bidder's eligibility before committing bid resources; the historical requirement is not a universal banking rule. A narrower core application limits scope, but leaves required services and interfaces to be separately funded and assigned.

Sources & Evidence

1. Port of Seattle Commission Agenda Memorandum: Spot Saver Virtual Queue Program
   · The Port's September 2021 virtual-queue memorandum identifies Airport Operations and Technology Delivery sponsorship, requests implementation authorization, and assigns recurring software, service, and maintenance responsibilities. It establishes historical purchasing arrangements, not later outcomes. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2021/2021_09_28_RM_10c.pdf))
2. Guidelines 3/2019 on Processing of Personal Data Through Video Devices
   · EDPB guidance requires specified purposes and a lawful basis for personal-video processing and distinguishes information that cannot identify a person. It supports resolving processing authority rather than relying on technical access. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))
3. Responses to Pre-Bid Queries - RFP No. SBI/CC/RNWM/QMS/2024-25/001
   · State Bank of India's 2024 pre-bid clarification retained bidder-specific queue-management experience requirements despite requests to rely on a software partner. This is a procurement-specific condition, not a universal banking rule. ([sbi.co.in](https://sbi.co.in/webfiles/uploads/files_2425/xx.xx-RFP%20Reponse%20to%20Pre-Bid%20Queries.pdf))
4. BriefCam Frequently Asked Questions
   · BriefCam's FAQ distinguishes product variants and separately expandable real-time response entitlements. An existing platform relationship does not itself establish the live functions included in an order. ([milestonesys.com](https://www.milestonesys.com/products/briefcam-faq/))
5. Queue management | Concierge
   · Qmatic Concierge supports front-line staff handling walk-ins, appointment check-in, queue status, and service rescheduling. The offering retains reception participation rather than establishing additional receiving-service capacity. ([qmatic.com](https://www.qmatic.com/products/concierge))

3.3. New Revenue Opportunities

Conditionally actionable revenue themes are planning access while design choices remain open; institutional queue modernization with a supported transition; airport flow information matched to a bounded measurement or wider operating need; library reservation and attendance management; venue staff coordination; and app-derived journey analytics compatible with the participating population. These routes serve different sponsors rather than a common bundle. Access depends on the relevant buyer's authority, required rights, qualification, and delivery commitment. Supported incumbent upgrades and effective existing workflows remain alternatives to replacement or another application. The Opportunity Mapping section provides the detailed assessment.

Sources & Evidence

1. LEGION | Bentley Systems
   · LEGION's pre-implementation planning proposition supports a conditional opportunity while consequential design choices remain open; the product description does not establish a particular buyer's decision value. ([bentley.com](https://www.bentley.com/products/legion/))
2. Daily Operations - Halo Solutions
   · Halo markets shared incident management, task scheduling, cross-team transfers, and oversight for venue and facilities teams. These establish a staff-coordination proposition distinct from independent crowd measurement. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))
3. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   · The app-derived offering includes heatmaps, dwell, flow, and engagement reporting, grounding a journey-analysis opportunity conditional on compatibility with the represented population. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
4. Passenger Flow Metrics Project - Port of Seattle Commission Agenda Memorandum, April 26, 2022
   · Seattle's April 2022 appraisal preferred consolidating new and existing passenger-flow information over more extensive tracking, while acknowledging reduced movement detail. This was a purchasing proposal, not evidence of completed implementation. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
5. Responses to Pre-Bid Queries - RFP No. SBI/CC/RNWM/QMS/2024-25/001
   · The bank's clarification establishes that partner capability did not automatically satisfy the contracting bidder's qualification condition in that procurement, grounding conditional access to the institutional queue opportunity. ([sbi.co.in](https://sbi.co.in/webfiles/uploads/files_2425/xx.xx-RFP%20Reponse%20to%20Pre-Bid%20Queries.pdf))
6. Airport Operations Software | Intelligent Airport Platform | Veovo
   · Veovo combines flow, queue, forecasting, and resource functions within its airport platform, supporting a wider operating-context option distinct from a bounded information purchase. ([veovo.com](https://veovo.com/airports))
7. Crowd Connected Standard Terms and Conditions, Version 4.0, April 2026
   · Crowd Connected's standard terms impose prior-written-consent conditions for specified surveillance and critical-national-infrastructure uses. The app-derived opportunity is consequently subject to the applicable commercial use rights, not merely functionality. ([crowdconnected.com](https://www.crowdconnected.com/legal/standard-terms-and-conditions.pdf))
8. Réserver des espaces - BU
   · Lyon xx.xx's library directs visitors to Affluences reservations and separately requires attendance confirmation. This buyer-origin workflow supports a library reservation-and-attendance opportunity without establishing complete occupancy observation. ([bu.univ-lyon3.fr](https://bu.univ-lyon3.fr/reserver-des-espaces-xx.xx))
9. Terms of Service - Halo Solutions
   · Halo's terms tie access to purchased user subscriptions and authorized users for internal business operations. Participation rights therefore remain a prerequisite to the assessed coordination route. ([halosolutions.com](https://www.halosolutions.com/terms-of-service-xx.xx/))
10. Queue management | Concierge
    · Concierge's staff-assisted arrival functions substantiate a scoped institutional queue-modernization proposition, subject to the buyer's approved service journey and operating resources. ([qmatic.com](https://www.qmatic.com/products/concierge))
11. End of Life Announcement for Qmatic Orchestra 6
    · The Orchestra xx.xx notice recommends planning an Orchestra xx.xx upgrade, establishing a supported-incumbent alternative within a conditional modernization opportunity rather than an automatic replacement purchase. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-for-qmatic-orchestra-xx.xx))

3.4. Next-Generation Business Models

The assessed delivery models vary in the responsibilities transferred to the supplier. Qmatic advertises Experience Cloud as SaaS and Orchestra as On-Premises software, while Xovis AERO combines passenger-flow software and sensors with implementation, training, and support. Advertised options should not be confused with completed customer migration or accepted service levels. Buyers should compare hosting and managed-delivery commitments separately from application rights; transferring work can simplify coordination without removing the institution's operating responsibilities.

Channels offer another conditional route. Qmatic's August 2026 Corvice AG announcement identifies a Swiss delivery and support relationship, not a completed customer installation. Where Qmatic's distributor terms govern, the reseller relationship remains separate from publisher obligations, and specified unresolved distributor defaults can affect continuity. Local assistance is commercially useful only when implementation, escalation, and continuity commitments are aligned; buyer-coordinated delivery remains an alternative when internal capability is sufficient.

Sources & Evidence

1. Qmatic | FAQs
   · Qmatic identifies Experience Cloud as multi-tenant SaaS and Orchestra as a modular On-Premises platform. These are advertised delivery alternatives, not proof of a customer's completed migration. ([qmatic.com](https://www.qmatic.com/resources/faq))
2. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   · Qmatic's August xx.xx 2026 announcement identifies Corvice AG as a Swiss partner providing local delivery, expertise, and support. It announces a channel relationship rather than a completed customer installation. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))
3. General Terms and Conditions of Sale and Delivery - Version August 2026
   · Qmatic's August 2026 terms distinguish the reseller agreement from publisher obligations, deny reseller authority to incur obligations for Qmatic, and permit service or license termination following specified uncured distributor defaults. Applicability depends on the governing customer framework. ([qmatic.com](https://www.qmatic.com/hubfs/General%20Terms%20and%20Conditions%20of%20Sale%20and%20Delivery%xx.xx%xx.xx.2026%xx.xx-xx.xx.pdf))
4. Airport software | Xovis
   · Xovis markets AERO as a managed airport passenger-flow offering combining sensors and software with implementation, training, and ongoing support. These advertised inclusions do not establish a customer's accepted service level. ([xovis.com](https://www.xovis.com/technology/airport-software))

3.5. Industry Roadmap

In 2026-2027, distinguish retirement of a use case from retirement of support. SEA Spot Saver is scheduled to end November xx.xx 2026 following improved checkpoint arrangements. Separately, Qmatic schedules Orchestra xx.xx support cessation for July xx.xx 2027 and Qmatic Show support and security-patch cessation for October xx.xx 2027; Show may continue running. Affected institutions should reassess continuing need and agree upgrade or replacement acceptance before the applicable support deadline.

Regulatory milestones shape specifications, not a mandate for named software. Covered U.S. state and local-government interfaces face April xx.xx 2027 or April xx.xx 2028 accessibility dates according to entity classification. UK guidance anticipates Martyn's Law commencement in spring 2027, with the exact date unconfirmed. Suppliers should establish the buyer's applicable duties before treating preparation as funded demand.

For 2028-2029, extension should follow accepted delivery, continuing obligations, and a defined additional operating need. For 2030-2032, integrated and modular supply remain conditional alternatives: wider airport platforms such as Veovo require coordinated authority, while BriefCam's function-specific entitlements preserve a modular purchasing boundary. Covered EU services' Data Act export and switching requirements strengthen scrutiny of exit arrangements without guaranteeing a functionally equivalent replacement. Buyers should retain a bounded deployment when added rights, interfaces, or operating responsibility remain unsettled.

Sources & Evidence

1. SEA Spot Saver | SEA Airport
   · SEA announces that Spot Saver will no longer be available beginning November xx.xx 2026 and connects reduced use with improved checkpoint arrangements. This is a scheduled service retirement, not a completed closure or category-wide outcome. ([portseattle.org](https://www.portseattle.org/SEAspotsaver))
2. Understanding Martyn's Law and the SIA's Role as Regulator
   · SIA guidance anticipates Martyn's Law commencement in spring 2027, with the exact date to be confirmed. Responsibility remains with the responsible organization, and the SIA and Home Office do not endorse particular compliance companies or services. ([gov.uk](https://www.gov.uk/guidance/understanding-martyns-law-and-the-sias-role-as-regulator))
3. End of Life Announcement: Qmatic Show
   · Qmatic's October xx.xx 2026 notice schedules Show support and security-patch cessation for October xx.xx 2027, states that the application will continue running, and notes possible hardware requirements for migration. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
4. Fact Sheet: New Rule on the Accessibility of Web Content and Mobile Apps Provided by State and Local Governments
   · DOJ identifies April xx.xx 2027 for entities with populations of at least xx.xx and April xx.xx 2028 for smaller entities and special district governments. Covered vendor-provided interfaces remain relevant, and conformance continues after the applicable date. ([ada.gov](https://www.ada.gov/resources/2024-xx.xx-xx.xx-web-rule/))
5. Data Act explained
   · The Data Act's covered data-processing-service provisions address contractual switching, open interfaces, and customer-generated data export, with protected-information exclusions. These support scrutiny of exit arrangements without establishing equivalent crowd-application functions. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/factpages/data-act-explained))
6. BriefCam Frequently Asked Questions
   · Variant-specific licensing and expandable response, user, and camera-channel rights provide a documented modular purchasing boundary. They support a conditional alternative to assuming portfolio-wide suite access. ([milestonesys.com](https://www.milestonesys.com/products/briefcam-faq/))
7. Airport Operations Software | Intelligent Airport Platform | Veovo
   · The airport platform's connected information and operating functions ground an integrated-supply option. The requirement for coordinated authority is a conditional commercial inference, not demonstrated future adoption. ([veovo.com](https://veovo.com/airports))

8. End of Life Announcement for Qmatic Orchestra 6

· Qmatic's June xx.xx 2026 notice schedules Orchestra xx.xx support, updates, maintenance releases, and bug fixes to end July xx.xx 2027. The notice is version-specific. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-for-qmatic-orchestra-xx.xx))

4. Market Overview

4.1. Introduction

Crowd Management Software serves distinct decisions before and during the use of physical spaces. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ These illustrate an important purchasing distinction: assessing a proposed layout, observing a crowd, and changing the way people arrive or receive service are related tasks, but not equivalent purchases.

The Global market includes focused applications and integrated offerings across planning, monitoring, queues, admission, guidance, and operational coordination. Commercial comparison should follow the buyer's intended decision and the responsibilities included in the contract. ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪

Figure 5. Global Crowd Management Software Market Size, 2017-2040 (USD Million, Growth %)

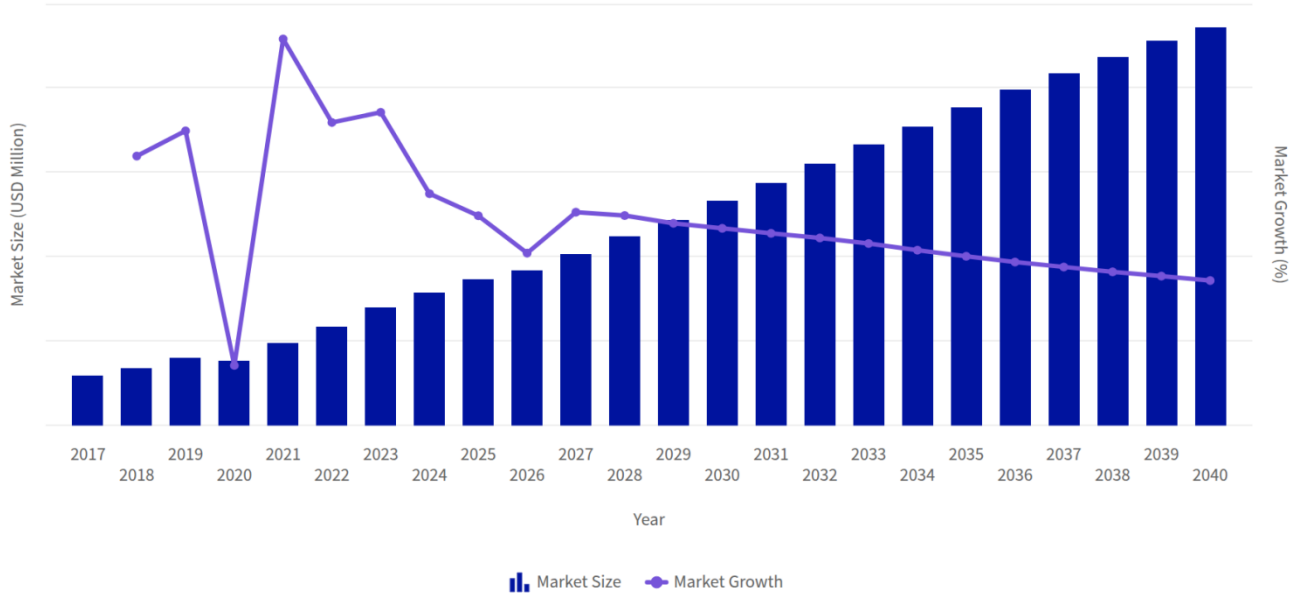


Table 2. Global Crowd Management Software Market Size, 2017-2040 (USD Million, Growth %)

Metric	2017	2024	2025	2026	2027	2032	2040
Market Size (USD Million)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Market Growth (%)	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. LEGION | Bentley Systems
   - Bentley describes LEGION as pedestrian modeling and simulation software for comparing designs and operating scenarios before implementation. ([bentley.com](https://www.bentley.com/products/legion/))
2. Qmatic | FAQs
   - Qmatic describes appointment, queue, virtual-queuing, and reporting functions within its customer-journey offerings. ([qmatic.com](https://www.qmatic.com/resources/faq))

4.2. Key Growth Contribution

Connecting visitor arrivals with an institution's service decisions provides a concrete adoption mechanism for Crowd Management Software. Qmatic Concierge supplies staff-assisted arrival functions, while Seattle's historical virtual-queue procurement illustrates the operational and technology sponsorship needed to fund a connected service. Suppliers need both a contractible arrival-management offering and the ability to allocate interfaces and support. The constraint is that organizing arrivals does not create service capacity: adoption is more defensible where the buyer can change the receiving operation, rather than relying on software alone to remove a staffing or physical-space bottleneck.

Figure 6. Global Crowd Management Software Market, Key Growth Contribution, by Region, 2025-2032 (USD Million)

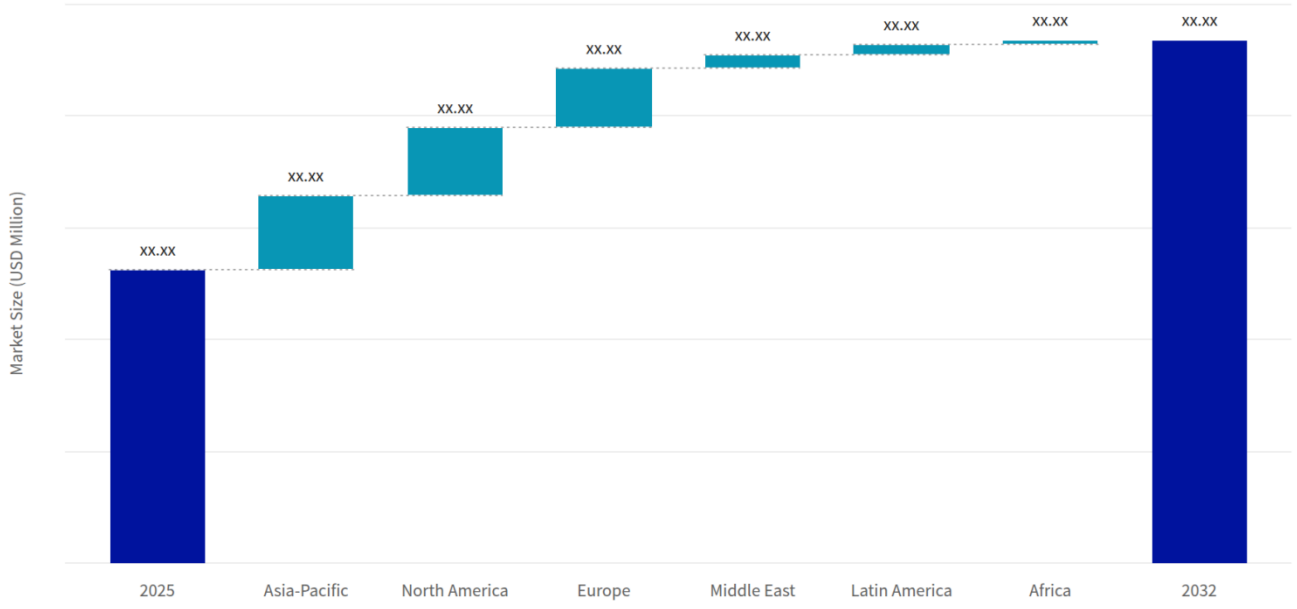


Figure 7. Global Crowd Management Software Market, Key Growth Contribution, by Country, 2025-2032 (CAGR %)

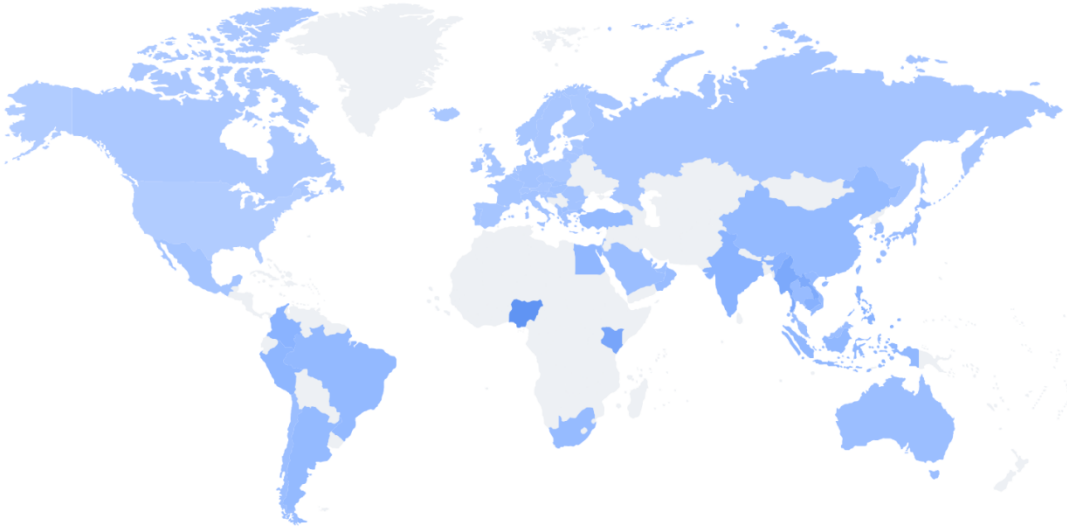


Table 3. Global Crowd Management Software Market, Key Growth Contribution, 2025-2032

Scope	Leading Category	Added Market Size (USD Million)	Growth Share (%)	CAGR (%)
Application	xx.xx	xx.xx	xx.xx	xx.xx
Country	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Data Source	xx.xx	xx.xx	xx.xx	xx.xx
Deployment Model	xx.xx	xx.xx	xx.xx	xx.xx
End User	xx.xx	xx.xx	xx.xx	xx.xx
License Term	xx.xx	xx.xx	xx.xx	xx.xx
Operating Environment	xx.xx	xx.xx	xx.xx	xx.xx
Region	xx.xx	xx.xx	xx.xx	xx.xx
Sales Channel	xx.xx	xx.xx	xx.xx	xx.xx
Software Offering	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. Port of Seattle Commission Agenda Memorandum: Spot Saver Virtual Queue Program

   · The Port of Seattle's September 2021 virtual-queue memorandum joins Airport Operations and Technology Delivery sponsorship, Commission authorization, and Aviation Operations funding responsibilities. It establishes historical institutional purchasing arrangements, not later implementation outcomes. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2021/2021_09_28_RM_10c.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

2. Queue management | Concierge

   · Qmatic Concierge supports staff handling walk-ins, appointment check-in, queue tickets, and rescheduling. The offering retains an active reception role rather than establishing additional service capacity. ([qmatic.com](https://www.qmatic.com/products/concierge))

3. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.

11. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

12. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

13. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

14. Qmatic | FAQs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

15. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

16. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

17. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

18. 5 easy packages to buy Halo for venues

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

19. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

20. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

21. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

22. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
23. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
24. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

25. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
26. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
27. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
28. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
29. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
30. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

31. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
32. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
33. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
34. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

35. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
36. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
37. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
38. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
39. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

40. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
41. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
42. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
43. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
44. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

45. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
46. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

47. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
48. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
49. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
50. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

51. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
52. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
53. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
54. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
55. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
56. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
57. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

58. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

59. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

60. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

61. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

62. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

63. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

64. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

65. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

66. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

67. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

68. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
69. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
70. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

71. Pricing & Per-Solution ROI Calculators | Zeour Ltd

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

72. Smart Retail Counter - People Counting and Queue Analytics Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

73. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

74. Bentley Systems, Incorporated - 2025 Form 10-K

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.

75. Crowd Connected Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))

76. Qminder Terms of Service

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

77. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

78. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

79. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

80. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

81. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
82. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
83. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
84. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
85. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

86. Zoho Backstage - Terms of Use

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

87. RetailNext Majority Growth Investment From Battery Ventures

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

88. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

89. Assess crowd safety risks and identify hazards

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

90. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
91. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

4.3. Industry Ecosystem & Value Chain Analysis

Value creation depends on connecting usable information to a licensed software function and an authorized operational decision. Crowd Connected's platform describes mapping integrations, APIs, exports, and entry-and-exit event feeds. ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■■■■■

Value capture can extend beyond the publisher's software contract. ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■ ■■ ■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■ Neither route automatically establishes better economics, local support, or responsibility for the complete outcome.

Sources & Evidence

1. Crowd Connected Platform
   · Crowd Connected lists mapping integrations, APIs, analytics exports, and device entry-and-exit event feeds. These establish advertised interfaces, not customer permissions or universal compatibility. ([crowdconnected.com](https://www.crowdconnected.com/platform/))
2. Partners | WaitTime
   · WaitTime identifies TD SYNNEX distribution for supporting hardware and services. ([thewaittimes.com](https://www.thewaittimes.com/partners))

4.3.1. Supply-Side Analysis

Suppliers package delivery and software rights in different ways. Qmatic describes Experience Cloud as a multi-tenant SaaS platform and Orchestra as an on-premises platform; Bentley advertises LEGION through a term subscription. ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■

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Sources & Evidence

1. LEGION | Bentley Systems
   · The published LEGION offering includes a term subscription; this supports separating license duration from deployment classification. ([bentley.com](https://www.bentley.com/products/legion/))
2. Qmatic | FAQs
   · Qmatic identifies Experience Cloud as multi-tenant SaaS and Orchestra as an on-premises platform. ([qmatic.com](https://www.qmatic.com/resources/faq))
3. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   · Qmatic announced on August xx.xx 2026 that Corvice AG would deliver, implement, and support its solutions in Switzerland. This establishes the announced partner role, not a completed customer deployment. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))

4.3.2. Demand-Side Analysis

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[redacted]
Commercial evaluation therefore needs an accountable operational sponsor and agreement from the owners of connected systems. Traveler convenience alone does not settle procurement eligibility, implementation responsibility, or renewal value.

Sources & Evidence

1. London Borough of Lambeth: Request for Quotation for an Online Queue Management System
   · Lambeth's August 2019 Customer Services quotation request sought an online visitor queue system with appointments, communications, reporting, and integrations. ([contractsfinder.service.gov.uk](https://www.contractsfinder.service.gov.uk/Notice/Attachment/53f81874-c0bf-42ad-acb1-38bbc703bbf7))
2. Port of Seattle Commission Agenda Memorandum: Spot Saver Virtual Queue Program
   · The Port of Seattle's September 2021 commission memorandum links Spot Saver with flight information, checkpoint interfaces, gates, and the airport mobile application. It describes a public-authority initiative, not a passenger software purchase. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2021/2021_09_28_RM_10c.pdf))

4.3.3. Stakeholder Analysis

Operational users, management sponsors, and system owners hold different forms of authority. [redacted] A shared dashboard can support coordination, but it does not itself resolve conflicting instructions or transfer managerial accountability.

People whose information is processed are also commercially relevant stakeholders. EDPB video guidance distinguishes identifiable personal information from information that cannot be related to a person. [redacted]

Sources & Evidence

1. Daily Operations - Halo Solutions
   · Halo's daily-operations portfolio describes shared incident and task functions across facilities, security, and management teams. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))
2. Guidelines 3/2019 on Processing of Personal Data Through Video Devices
   · EDPB guidance distinguishes identifiable personal information from information that cannot be related to a person. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))

4.4. Market Dynamics

[redacted] Such combinations can make crowd information useful across teams, provided the buyer assigns authority to respond and funds the associated service responsibilities. A combined interface does not by itself establish that every function is needed, independently purchased, or effective in the buyer's setting.

Renewal depends on the continuing role of the application. The Port of Seattle has announced that SEA Spot Saver will cease to be available on November xx.xx 2026. [redacted]

Sources & Evidence

1. Daily Operations - Halo Solutions
   · The offering combines incident management, task coordination, and reporting. The commercial implication that usefulness requires assigned response authority is conditional analysis rather than a demonstrated customer outcome. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))
2. SEA Spot Saver | SEA Airport
   · The Port of Seattle announces that SEA Spot Saver will no longer be available beginning November xx.xx 2026. This is a scheduled cessation, not a completed closure. ([portseattle.org](https://www.portseattle.org/SEAspotsaver))

4.4.1. Key Drivers

4.4.1.1. Consequential layout decisions create a planning-software purchase trigger

LEGION's advertised ability to compare pedestrian scenarios before implementation connects software demand to layout and operating-plan decisions. [redacted] Relevance depends on an active project, usable planning inputs, and a buyer able to act on the analysis; a completed design may offer less decision value.

Sources & Evidence

1. LEGION | Bentley Systems
   · LEGION's advertised scenario-comparison functions support the conditional relevance of planning software before a layout or operating-plan commitment; the page does not establish a buyer outcome. ([bentley.com](https://www.bentley.com/products/legion/))

4.4.1.2. Arrival management becomes more valuable when linked to service delivery

[redacted] A buyer can justify evaluation when

unmanaged arrivals disrupt service delivery, but software cannot resolve insufficient service capacity by itself. Procurement should link arrival rules to the department responsible for staffing and service completion.

Sources & Evidence

1. Qmatic | FAQs
   · The published combination of appointments, queues, and reporting supports an arrival-to-service coordination proposition, not proof that software creates service capacity. ([qmatic.com](https://www.qmatic.com/resources/faq))

4.4.1.3. Existing technology relationships can facilitate analytics adoption

[illegible] This provides a concrete example of crowd analytics being added through an established technology relationship. Similar adoption is conditional on compatible infrastructure, access rights, and support arrangements; the example does not establish plug-and-play suitability for other venues.

Sources & Evidence

1. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
   · Cisco's 2022 account describes WaitTime deployed at the Etihad Stadium using the existing Cisco network and Meraki cameras. ([newsroom.cisco.com](https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2022/m12/manchester-city-collaborates-with-cisco-to-deploy-crowd-intelligence-solution-waittime.html))

4.4.2. Key Restraints

4.4.2.1. Data permissions can prevent an otherwise compatible deployment

European Data Protection Board guidance makes personal-data processing through video devices a substantive purchasing condition. [illegible] Buyers must resolve purpose, identifiability, and applicable responsibilities before committing; genuinely non-personal information presents a different regulatory position.

Sources & Evidence

1. Guidelines 3/2019 on Processing of Personal Data Through Video Devices
   · The guidance identifies a data protection impact assessment requirement for systematic monitoring of publicly accessible areas on a large scale and addresses lawful purposes for video processing. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))

4.4.2.2. Software does not absorb the organizer's wider delivery obligations

Zoho Backstage's terms leave event planning, safety, security, accessibility, capacity, and emergency arrangements with the organizer. This illustrates why software acquisition does not replace the wider obligations necessary to deliver an event. [illegible]

Sources & Evidence

1. Zoho Backstage - Terms of Use
   · Zoho Backstage's terms assign event delivery, staffing, safety, security, accessibility, capacity, and emergency arrangements to the organizer rather than the technology provider. ([zoho.com](https://www.zoho.com/backstage/terms.html))

4.4.2.3. A useful deployment need not become a permanent requirement

[redacted] The commercial restraint is use-case persistence: a supplier must retain a necessary role within the buyer's changing operation. This example does not establish failure of virtual queuing generally or disclose the renewal economics of other airport contracts.

Sources & Evidence

1. SEA Spot Saver | SEA Airport
   · The announced retirement establishes that this existing queue-management service is not continuing indefinitely; it does not establish failure of the category or other contracts' renewal economics. ([portseattle.org](https://www.portseattle.org/SEAspotsaver))

4.4.3. Key Opportunities

4.4.3.1. Planning decisions with an open change window

Infrastructure sponsors can procure planning capability while a consequential layout decision remains open. [redacted] A bounded professional deliverable is the alternative when continuing internal software use is unnecessary.

Sources & Evidence

1. LEGION | Bentley Systems
   · Bentley markets LEGION for comparing pedestrian designs and operating scenarios before implementation. This supports a conditional opportunity tied to an open planning decision, not a demonstrated project benefit. ([bentley.com](https://www.bentley.com/products/legion/))

4.4.3.2. Supported transitions for affected institutional installations

Support retirement creates a defined evaluation window for affected queue and signage installations. Qmatic Show illustrates why suppliers can compete on supported migration and continuity rather than added features alone. [redacted]

Sources & Evidence

1. End of Life Announcement: Qmatic Show
   · Qmatic Show's announced support retirement creates a replacement evaluation trigger; continued application operation is expressly possible, and migration can require hardware changes. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

4.4.3.3. Passenger-flow information with a bounded delivery commitment

Airports can address a funded passenger-flow question through targeted consolidation instead of comprehensive tracking. ■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ Capture requires feed rights, integration ownership, and an operating sponsor; additional movement detail may justify a broader alternative in other settings.

Sources & Evidence

1. Passenger Flow Metrics Project - Port of Seattle Commission Agenda Memorandum, April 26, 2022
   · The Port's April 2022 appraisal preferred consolidating existing and new passenger-flow information over more extensive tracking, acknowledging less movement detail and fewer installation dependencies. This was an authorization proposal. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

4.4.3.4. Institutional reservations matched to the required information

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Sources & Evidence

1. Affluences : découvrez nos différentes offres
   · Affluences separates licensed SaaS access from counting hardware available through purchase or rental, allowing the purchasing questions of reservations and observation to be distinguished. ([pro.affluences.com](https://www.pro.affluences.com/offres))
2. Réserver des espaces - BU
   · Lyon xx.xx's library uses Affluences reservations and requires separate attendance confirmation, establishing an institutional access workflow rather than equating a booking with presence. ([bu.univ-lyon3.fr](https://bu.univ-lyon3.fr/reserver-des-espaces-xx.xx))

4.4.3.5. Accountable staff coordination beyond an analytics display

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Sources & Evidence

1. Daily Operations - Halo Solutions
   · Halo markets shared incident management, task scheduling, cross-team transfers, and oversight for venue and facilities operations. These substantiate a coordination proposition rather than independent crowd measurement. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))

4.4.4. Key Challenges

4.4.4.1. Information coverage must match the buyer's operational decision

Different data records describe different populations. ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ Procurement must specify the population and decision the software must support; a broader data combination does not automatically resolve omissions or overlapping records.

Sources & Evidence

1. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   · Crowd Connected describes location analytics generated from users of the buyer's mobile app, supporting a bounded observation population rather than presumed coverage of every visitor. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
2. Event Access Control & Management - We are InSite
   · InSite describes ticket scanning, access control, and capacity-management functions. These establish an admission-related information route, not equivalence with app activity or every form of physical occupancy observation. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

4.4.4.2. Monitoring and public guidance require separate delivery commitments

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Sources & Evidence

1. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
   · The account distinguishes installed monitoring from prospective digital-signage integration; it does not establish the venue's later configuration. ([newsroom.cisco.com](https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2022/m12/manchester-city-collaborates-with-cisco-to-deploy-crowd-intelligence-solution-waittime.html))

4.4.4.3. Procurement evidence can be a barrier beyond product functionality

Lambeth's 2019 quotation request required evidence of comparable projects, a demonstration, security controls, and reporting capability. In that procurement, a product description alone was insufficient to establish suitability. ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■

Sources & Evidence

1. London Borough of Lambeth: Request for Quotation for an Online Queue Management System
   · The historical request assessed comparable projects, a demonstration, information-security controls, and reporting capability.
   ([contractsfinder.service.gov.uk](https://www.contractsfinder.service.gov.uk/Notice/Attachment/53f81874-c0bf-42ad-acb1-38bbc703bbf7))

4.5. Porter’s Five Forces Analysis

Rivalry is task-specific rather than a contest among interchangeable suites. Camera-based crowd intelligence and mobile-app location analytics can address overlapping monitoring questions, but their information coverage differs. ■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■

Buyer leverage is strongest where requirements and evaluation conditions are explicit. ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■ ■■ ■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■ ■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ Such continuity illustrates an established commercial relationship, but does not establish current sole-source dependence or an inability to switch.

Supplier bargaining includes complementary inputs and service reach. WaitTime identifies distribution relationships for supporting hardware and services, while advertising compatibility across technology partners. ■■■■ ■■■■■■■ ■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■

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Sources & Evidence

1. Partners | WaitTime
   · WaitTime describes relationships across camera, equipment, and cloud partners; its compatibility claims do not independently establish suitability for a buyer's estate.
   ([thewaittimes.com](https://www.thewaittimes.com/partners))

2. London Borough of Lambeth: Request for Quotation for an Online Queue Management System
   · The request evaluated quality and commercial terms rather than treating product functionality alone as sufficient qualification. ([contractsfinder.service.gov.uk](https://www.contractsfinder.service.gov.uk/Notice/Attachment/53f81874-c0bf-42ad-acb1-38bbc703bbf7))
3. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   · The app-based offering provides a different information route from camera-based monitoring; substitutability requires a matched buyer task and coverage requirement. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
4. UK Intellectual Property Office Decision O/0757/25
   · UK Intellectual Property Office Decision O/xx.xx/xx.xx reproduces historic Transport for London records concerning continued LEGION licenses and associated services. These support relationship continuity, not current exclusivity or an established inability to switch. ([ipo.gov.uk](https://www.ipo.gov.uk/t-challenge-decision-results/o075725.pdf))
5. Assess Crowd Safety Risks and Identify Hazards - HSE
   · HSE guidance addresses risk assessment, site suitability, existing precautions, crowd-management planning, and review, establishing a broader set of controls than software alone. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

4.6. PESTLE Analysis

Public-safety legislation can create a preparation trigger without mandating a software purchase. The Security Industry Authority's July 2026 guidance anticipates Martyn's Law coming into force in spring 2027, with the exact date to be confirmed. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪

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Accessibility and outdoor conditions affect the purchasing specification. ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ An offering demonstrated in a permanent indoor setting should not be assumed commercially suitable for an outdoor event with different support and communications requirements.

Intellectual-property and trade exposure require transaction-specific treatment. Cisco describes WaitTime as patented, but that description does not establish the territorial scope, validity, or exclusivity of particular claims. ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪

[redacted]

Sources & Evidence

1. Partners | WaitTime
   · The inclusion of supporting hardware establishes a basis for conditional cross-border procurement questions, but this source does not establish tariff classification or applicable duties.
   ([thewaittimes.com](https://www.thewaittimes.com/partners))
2. Port of Seattle Commission Agenda Memorandum: Spot Saver Virtual Queue Program
   · The memorandum places virtual queuing within a wider airport implementation project, supporting the distinction between acquiring software and authorizing its surrounding delivery commitments. Budget-tightening responses are conditional analysis, not a reported macroeconomic outcome.
   ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2021/2021_09_28_RM_10c.pdf))
3. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
   · Cisco describes WaitTime as patented. This is an attributed supplier description, not independent verification of patent territory, validity, or exclusive coverage.
   ([newsroom.cisco.com](https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2022/m12/manchester-city-collaborates-with-cisco-to-deploy-crowd-intelligence-solution-waittime.html))
4. Assess Crowd Safety Risks and Identify Hazards - HSE
   · The guidance identifies considerations including young people, disabilities, weather, and outdoor-site suitability. Their procurement implications are contextual analysis, not universal product requirements.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
5. Understanding Martyn's Law and the SIA's Role as Regulator
   · The SIA's July 2026 guidance anticipates spring 2027 commencement, with the exact date to be confirmed; identifies differentiated obligations; retains responsibility with the responsible person; and states that the SIA and Home Office do not endorse specific compliance companies or services.
   ([gov.uk](https://www.gov.uk/guidance/understanding-martyns-law-and-the-sias-role-as-regulator))

4.7. Market Outlook

[redacted] This favors proposals that identify the decision being changed and the party accountable for delivery. It does not make every advertised application commercially accessible.

Renewal and expansion face different counterforces. [redacted] Authorization, accepted delivery, and a renewed operating mandate are stronger turning-point indicators than another product announcement.

Sources & Evidence

1. Port of Seattle Commission Agenda Memorandum: Spot Saver Virtual Queue Program
   · The airport memorandum connects software procurement with institutional authorization and complementary delivery commitments, grounding the outlook's distinction between a useful application and accessible funded demand. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2021/2021_09_28_RM_10c.pdf))
2. Guidelines 3/2019 on Processing of Personal Data Through Video Devices
   · EDPB video guidance distinguishes identifiable information from information without reference to a person and addresses purpose and lawful processing. It grounds a deployment-specific constraint, not a blanket prohibition on analytics. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))
3. SEA Spot Saver | SEA Airport
   · SEA announces Spot Saver's retirement beginning November xx.xx 2026 and attributes reduced use to improved checkpoint arrangements. This provides a buyer-origin counterexample to automatic service persistence. ([portseattle.org](https://www.portseattle.org/SEAspotsaver))

4.7.1. Near-Term Market Outlook (0-2 Years)

The 2026-2027 horizon contains specific lifecycle decisions rather than a general replacement mandate. Qmatic schedules Orchestra xx.xx support cessation for July xx.xx 2027 and Qmatic Show support and security-patch cessation for October xx.xx 2027. ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■

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Sources & Evidence

1. Understanding Martyn's Law and the SIA's Role as Regulator
   · SIA guidance expects Martyn's Law commencement in spring 2027, with the exact date to be confirmed. Responsibility remains with the responsible organization, and government does not endorse specific compliance suppliers. ([gov.uk](https://www.gov.uk/guidance/understanding-martyns-law-and-the-sias-role-as-regulator))
2. End of Life Announcement: Qmatic Show
   · Qmatic's October xx.xx 2026 notice schedules Show support and security-patch cessation for October xx.xx 2027, while stating that the application will continue running. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

3. Fact Sheet: New Rule on the Accessibility of Web Content and Mobile Apps Provided by State and Local Governments
   · DOJ states that the amended Title II compliance date is April xx.xx 2027 for state and local-government entities with populations of at least xx.xx. Covered third-party provision remains relevant. ([ada.gov](https://www.ada.gov/resources/2024-xx.xx-xx.xx-web-rule/))
4. End of Life Announcement for Qmatic Orchestra 6
   · Qmatic schedules Orchestra xx.xx support, updates, maintenance releases, and bug fixes to end July xx.xx 2027, and recommends planning an Orchestra xx.xx upgrade. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-for-qmatic-orchestra-xx.xx))

4.7.2. Medium-Term Market Outlook (3-5 Years)

[illegible] Suppliers should support the contracted visitor interface through changes rather than rely on a one-time general assurance. Extension to additional departments is justified only where their access needs and responsibilities are included.

[illegible] Buyers should extend scope only after agreeing ongoing responsibility, replacement arrangements, and the additional operating need. Otherwise, retaining the accepted footprint or selecting a separately accountable application preserves a credible alternative.

Sources & Evidence

1. Fact Sheet: New Rule on the Accessibility of Web Content and Mobile Apps Provided by State and Local Governments
   · DOJ identifies April xx.xx 2028 for smaller entities and special district governments and requires continued conformance afterward, subject to the rule's applicable provisions. ([ada.gov](https://www.ada.gov/resources/2024-xx.xx-xx.xx-web-rule/))
2. Data Act explained
   · The Data Act addresses covered data-processing-service contracts, switching, open interfaces, and customer-generated data export, with protected-information exclusions. These provisions support evaluating exit commitments rather than assuming application substitutability. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/factpages/data-act-explained))
3. Airport software | Xovis
   · AERO's managed-delivery proposition supports comparing the responsibilities actually transferred before extending a passenger-flow deployment. The medium-term implication is conditional, not a forecast of adoption. ([xovis.com](https://www.xovis.com/technology/airport-software))

4.7.3. Long-Term Market Outlook (5-10 Years)

[illegible]

[redacted] Veovo's combination of airport information and operating functions makes wider coordination plausible where the operator can govern the connected relationships. BriefCam's separately expandable entitlements demonstrate the counterforce: an established platform relationship still requires the particular live functions and rights needed for expansion.

Multi-site buyers should preserve the ability to revise that choice through explicit application rights, interface ownership, transferable records, and continuity commitments. For covered EU services, Data Act switching provisions support exit-contract evaluation without guaranteeing a functionally equivalent replacement. [redacted]

Sources & Evidence

1. Data Act explained
   · The covered software-service switching provisions strengthen an exit-contract comparison without establishing equivalent crowd functions or eliminating customer migration responsibilities. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/factpages/data-act-explained))
2. BriefCam Frequently Asked Questions
   · Milestone's BriefCam FAQ distinguishes product variants and expandable user, camera-channel, and real-time response entitlements. Platform ownership or access does not grant every live crowd function. ([milestonesys.com](https://www.milestonesys.com/products/briefcam-faq/))
3. Airport Operations Software | Intelligent Airport Platform | Veovo
   · The combination of airport information and operating functions grounds an integrated-platform scenario; suitability still depends on organizational authority and contracted interfaces. ([veovo.com](https://veovo.com/airports))

4.8. Go-to-Market Strategy

[redacted] Where that condition is unmet, defer the bid or establish a permitted participation arrangement rather than presenting a stronger product demonstration as a cure. Historical qualification conditions must be checked against the new solicitation, not generalized across banking.

[redacted] Where Qmatic's distributor framework governs, the reseller cannot bind the publisher; aligned commitments are therefore necessary. Buyers with sufficient implementation resources can compare publisher-led engagement, while partners should compete on enforceable local accountability rather than imply that appointment transfers every publisher obligation.

[redacted] Use a clearly defined core commitment with separately described implementation, support, renewal, and expansion obligations. This qualitative pricing approach improves scope comparability; it does not establish that the narrower option has better economics when essential services remain outside it.

The business sequence is to establish the operational sponsor and budget owner, confirm eligibility and required rights, agree the seller and responsibility allocation, and obtain acceptance before retiring an existing arrangement. [redacted] Broader rollout should follow an agreed operating need and delivery commitment, not precede them.

Sources & Evidence

1. LEGION | Bentley Systems
   · The publisher offers software purchasing and separately described training or expert-service entitlements, supporting explicit separation of application rights and delivery obligations. ([bentley.com](https://www.bentley.com/products/legion/))
2. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   · Qmatic's August xx.xx 2026 announcement identifies Corvice AG as a Swiss partner contributing local delivery and support. It establishes an announced channel role, not customer-specific acceptance or service levels. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))
3. Port of Seattle Commission Agenda Memorandum: Spot Saver Virtual Queue Program
   · The historical initiative allocates software, integration, maintenance, and operating responsibilities across organizational functions, supporting a sponsor-led contracting sequence rather than participant-led selling. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2021/2021_09_28_RM_10c.pdf))
4. Responses to Pre-Bid Queries - RFP No. SBI/CC/RNWM/QMS/2024-25/001
   · State Bank of India's 2024 clarification retained bidder-specific queue-management experience and reference conditions despite requests to rely on an OEM partner. This historical procurement supports checking the actual bidder's eligibility before pursuit. ([sbi.co.in](https://sbi.co.in/webfiles/uploads/files_2425/xx.xx-RFP%20Reponse%20to%20Pre-Bid%20Queries.pdf))
5. BriefCam Frequently Asked Questions
   · The variant-specific licensing structure supports proposing a named crowd function and expansion rights instead of an unspecified portfolio-wide entitlement. ([milestonesys.com](https://www.milestonesys.com/products/briefcam-faq/))
6. General Terms and Conditions of Sale and Delivery - Version August 2026
   · Qmatic's August 2026 distributor framework separates the reseller agreement from Q-MATIC AB's obligations and states that the reseller cannot bind Qmatic. Applicability depends on the customer's governing contract. ([qmatic.com](https://www.qmatic.com/hubfs/General%20Terms%20and%20Conditions%20of%20Sale%20and%20Delivery%xx.xx%xx.xx.2026%xx.xx-xx.xx.pdf))

5. Market Insights

5.1. Consumer Insights & End-User Perspective

Software buyers and crowd participants occupy different commercial roles. The Port of Seattle's September 2021 virtual-queue memorandum joined Airport Operations and Technology Delivery sponsorship with a request for Commission authorization and recurring funding through the Aviation Operations budget. ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■■ ■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■

Support retirement can create a replacement trigger even when an application still works. ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■■ ■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ Continued operation avoids immediate migration but retains unsupported-software exposure; a recommended successor does not establish an effortless transition.

Sources & Evidence

1. Port of Seattle Commission Agenda Memorandum: Spot Saver Virtual Queue Program
   - The September 2021 memorandum identifies Airport Operations and Technology Delivery sponsors, requests Commission authorization, and assigns recurring software, service and maintenance funding to Aviation Operations.
   ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2021/2021_09_28_RM_10c.pdf))
2. End of Life Announcement: Qmatic Show
   - Qmatic's October xx.xx 2026 announcement schedules Qmatic Show support and security-patch cessation for October xx.xx 2027; the application can continue operating, and migration to Qmatic Display may require new hardware.
   ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

5.2. Consumer Experience Benchmarking

For Queue and Arrival Management Software, the benchmark is a complete service journey, not simply a shorter visible queue. Lambeth's August 2019 quotation request combined web booking, staff-assisted appointments, visitor calling and reporting with references and a demonstration. ■■ ■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■

For Crowd Monitoring and Analytics Software, observation coverage is a different benchmark. Crowd Connected describes analytics based on a venue's mobile-app users. ■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■

[redacted]

Sources & Evidence

1. London Borough of Lambeth: Request for Quotation for an Online Queue Management System
   - Lambeth's August 2019 request combined online and staff-assisted appointments, visitor calling, reporting, comparable references and a demonstration as purchasing requirements. ([contractsfinder.service.gov.uk](https://www.contractsfinder.service.gov.uk/Notice/Attachment/53f81874-c0bf-42ad-acb1-38bbc703bbf7))
2. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   - Crowd Connected describes movement, dwell and flow analytics using data from the customer's mobile-app users; this establishes an app-dependent observation population rather than universal visitor coverage. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))

5.3. Opportunity Mapping

Commercial priority should follow the clarity of the buyer's decision, purchasing authority, and obtainable delivery commitment rather than the breadth of a supplier's catalog. A named application is a candidate offering; it becomes an accessible opportunity only when the proposed bidder qualifies, the necessary rights are available, and the buyer can authorize the associated operating changes. [redacted]

[redacted] A bounded professional deliverable is the credible alternative when the sponsor needs an accountable assessment rather than continuing application use. Suppliers should qualify the design-change window and revision owner before pursuing the project; an already settled decision weakens the case for either additional entitlement or commissioned analysis.

Institutional service queues present a more specific modernization route where an installed version faces support retirement or an approved service journey needs changing. [redacted] A capable software partner therefore cannot be presumed to make an otherwise ineligible bidder acceptable.

[redacted]

[illegible] CVG's own account corroborates a Veovo application without qualifying every module. An airport lacking authority over connected resources should compare a defined measurement commitment with broader platform scope; expansion becomes more credible when the relevant system owners agree interfaces, operating responsibilities, and acceptance.

Libraries can address space allocation without assuming a need for comprehensive sensing. Lyon xx.xx's Affluences workflow separates reservations from attendance confirmation, and Affluences distinguishes platform access from counting hardware. [illegible]

Venue operators with fragmented staff handoffs can evaluate coordination separately from measurement. [illegible] A coordination application should not be procured as a substitute for missing crowd-observation coverage.

[illegible] Its consent-sensitive contractual uses also require specific agreement. The commercial trigger is a named engagement or planning decision that can use the represented information, not a general assumption that a heatmap establishes complete occupancy or improved sales.

Sources & Evidence

1. LEGION | Bentley Systems
   · LEGION's planning proposition supports evaluating internal software access where repeated project revisions remain necessary. Customer-specific rights and expertise remain prerequisites. ([bentley.com](https://www.bentley.com/products/legion/))
2. Daily Operations - Halo Solutions
   · The offering supports targeting an unresolved staff-handoff problem where task ownership can be agreed; catalog functionality does not demonstrate customer outcomes. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))
3. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   · Crowd Connected describes analytics through the customer's mobile app, including engagement, dwell, flow, and exports. This supports a participation-compatible analytical route, not presumed observation of all visitors. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))

4. Passenger Flow Metrics Project - Port of Seattle Commission Agenda Memorandum, April 26, 2022
   · The proposal provides a buyer-origin comparison of targeted consolidation, extensive tracking, and deferral, supporting bounded information delivery where it answers the approved airport question. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
5. Responses to Pre-Bid Queries - RFP No. SBI/CC/RNWM/QMS/2024-25/001
   · The bank's clarification demonstrates that partner capability did not automatically satisfy the contracting bidder's qualification conditions in that procurement; it is not a universal banking rule. ([sbi.co.in](https://sbi.co.in/webfiles/uploads/files_2425/xx.xx-RFP%20Reponse%20to%20Pre-Bid%20Queries.pdf))
6. Airport Operations Software | Intelligent Airport Platform | Veovo
   · Veovo markets flow, queue, forecasting, and resource functions within its airport platform. This supports considering broader coordination where the airport controls the relevant operating relationships. ([veovo.com](https://veovo.com/airports))
7. Innovation
   · CVG Airport identifies its use of Veovo's curb-to-flight flow-management system for decision-making. This is buyer-origin support for a particular application, not qualification of every platform module or another airport. ([cvgairport.com](https://www.cvgairport.com/business/innovation/))
8. Crowd Connected Standard Terms and Conditions, Version 4.0, April 2026
   · Crowd Connected's April 2026 standard terms impose prior-written-consent conditions for specified surveillance and critical-national-infrastructure uses; a negotiated agreement may vary the standard terms. ([crowdconnected.com](https://www.crowdconnected.com/legal/standard-terms-and-conditions.pdf))
9. Affluences : découvrez nos différentes offres
   · The published offer supports specifying required platform scope and counting dependencies separately; it does not establish that every customer needs the complete combination. ([pro.affluences.com](https://www.pro.affluences.com/offres))
10. Réserver des espaces - BU
    · The library's visitor instructions support a reservation-and-attendance proposition; they do not establish complete occupancy measurement or eligibility rules for other institutions. ([bu.univ-lyon3.fr](https://bu.univ-lyon3.fr/reserver-des-espaces-xx.xx))
11. Terms of Service - Halo Solutions
    · Halo's terms distinguish authorized-user entitlements, internal-business use, and customer-specific orders. Those boundaries matter when employees, contractors, or related businesses share a workflow. ([halosolutions.com](https://www.halosolutions.com/terms-of-service-xx.xx/))
12. Queue management | Concierge
    · Concierge's staff-assisted arrival functions support targeting a defined institutional service journey, subject to purchased scope and the buyer's service resources. ([qmatic.com](https://www.qmatic.com/products/concierge))
13. End of Life Announcement for Qmatic Orchestra 6
    · The version-specific notice supports an upgrade-versus-replacement decision for affected institutions, without establishing their migration requirements or a funded replacement purchase. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-for-qmatic-orchestra-xx.xx))
14. Architecture | Mott MacDonald
    · Mott MacDonald describes its STEPS pedestrian-simulation tool within architecture services. That record supports a professional-deliverable alternative without establishing independently usable software rights for the client. ([mottmac.com](https://www.mottmac.com/en-us/markets-and-services/engineering/architecture/))
15. Airport software | Xovis
    · Xovis advertises AERO as a managed airport passenger-flow offering combining sensors and software with implementation, training, and ongoing support. Advertised delivery breadth does not establish another airport's contracted service level. ([xovis.com](https://www.xovis.com/technology/airport-software))

5.4. Distribution Channel Analysis

[illegible] The documented relationship concerns local delivery and support; it does not settle a customer's implementation timetable or liability allocation. Buyers with implementation resources can assess the direct route, while those needing local assistance should require the intermediary's delivery and escalation commitments in writing.

WaitTime identifies TD SYNNEX as a distributor for supporting hardware and services. Distribution does not itself transfer responsibility for the crowd-management outcome. [illegible]

Sources & Evidence

1. LEGION | Bentley Systems
   - Bentley's LEGION product page provides an add-to-cart purchasing route through the publisher's offering. ([bentley.com](https://www.bentley.com/products/legion/))
2. Partners | WaitTime
   - WaitTime identifies TD SYNNEX as a distributor of hardware and services needed by its platform. ([thewaittimes.com](https://www.thewaittimes.com/partners))
3. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   - Qmatic announced Corvice AG as a Swiss Premier Solution Partner on August xx.xx 2026, describing local access, delivery, service expertise and support rather than a customer-specific implementation contract. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))

5.5. Pricing Trend Analysis

Lambeth's queue-software request separated system acquisition, training, self-service, support, messaging integration and hosting. Bentley's LEGION subscription combines software rights with credits for training or services. [illegible]

Integrated event software can also retain outside charges. Zoho Backstage's terms leave third-party service and device licenses and fees with the customer. [illegible]

Trade exposure arises where software delivery includes imported supporting devices, as can occur through WaitTime's hardware-and-services channel. ■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ Applicability depends on the actual goods, origin, destination and contract; no software brand establishes tariff treatment.

Sources & Evidence

1. LEGION | Bentley Systems
   · The advertised LEGION subscription combines software entitlement with credits redeemable for training or expert services, establishing a bundled commercial scope.
   ([bentley.com](https://www.bentley.com/products/legion/))
2. Partners | WaitTime
   · The documented distribution relationship includes supporting hardware, providing a commercial basis for conditional import-cost analysis where a deployment involves cross-border goods.
   ([thewaittimes.com](https://www.thewaittimes.com/partners))
3. London Borough of Lambeth: Request for Quotation for an Online Queue Management System
   · The request distinguished system acquisition, training, queue and self-service functions, support, messaging integration and hosting in its commercial schedule.
   ([contractsfinder.service.gov.uk](https://www.contractsfinder.service.gov.uk/Notice/Attachment/53f81874-c0bf-42ad-acb1-38bbc703bbf7))
4. Zoho Backstage - Terms of Use
   · Zoho Backstage's terms make customers responsible for third-party service and device licenses and fees, distinguishing the software subscription from complementary commercial obligations.
   ([zoho.com](https://www.zoho.com/backstage/terms.html))
5. Determine Total Export Price
   · The International Trade Administration identifies freight, tariffs and taxes as landed-cost components and explains that sales-contract terms commonly allocate duty and tax responsibility.
   ([trade.gov](https://www.trade.gov/determine-total-export-price))

5.6. Regulatory Compliance & Standards Framework

For EU deployments processing identifiable video, data access is not processing authorization. ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■ Non-identifying information can fall outside the GDPR's personal-data scope, but an aggregate dashboard alone does not establish the status of underlying inputs.

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UK venue buyers should distinguish preparation from an already operative software mandate. SIA guidance expects Martyn's Law to commence in spring 2027, with the exact date

unconfirmed, and states that responsibility cannot be passed on. ■■■■■■■ ■■■ ■■■ ■■■ ■■■ ■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■■

Covered cloud services also face contractual exit requirements under the EU Data Act, applicable since September xx.xx 2025. Its SaaS provisions address interfaces and data export, and its prohibition on provider switching charges takes effect January xx.xx 2027. ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■ ■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■

Intellectual-property protection remains transaction-specific. Cisco describes WaitTime as patented, while WIPO explains that patent rights are territorial. ■■■■ ■■■■■■■■■■■ ■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■■

Sources & Evidence

1. Guidelines 3/2019 on Processing of Personal Data Through Video Devices
   - EDPB guidance distinguishes personal video information from data that cannot identify a person and explains the need for a lawful processing purpose. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))
   - The guidance identifies the GDPR impact-assessment requirement for systematic monitoring of publicly accessible areas on a large scale. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))
2. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
   - Cisco describes WaitTime as patented; its announcement does not establish patent claims, territorial coverage or enforceability. ([newsroom.cisco.com](https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2022/m12/manchester-city-collaborates-with-cisco-to-deploy-crowd-intelligence-solution-waittime.html))
3. Understanding Martyn's Law and the SIA's Role as Regulator
   - SIA guidance anticipates Martyn's Law commencing in spring 2027, with the exact date to be confirmed. ([gov.uk](https://www.gov.uk/guidance/understanding-martyns-law-and-the-sias-role-as-regulator))
   - The guidance retains responsibility with the responsible organization and states that neither the SIA nor the Home Office endorses particular compliance companies or services. ([gov.uk](https://www.gov.uk/guidance/understanding-martyns-law-and-the-sias-role-as-regulator))
4. Fact Sheet: New Rule on the Accessibility of Web Content and Mobile Apps Provided by State and Local Governments
   - DOJ explains that Title II generally requires WCAG xx.xx Level AA for state and local-government web content and mobile applications, including third-party provision. ([ada.gov](https://www.ada.gov/resources/2024-xx.xx-xx.xx-web-rule/))
   - Following the April 2026 interim final rule, the compliance date is April xx.xx 2027 for entities with populations of at least xx.xx and April xx.xx 2028 for smaller entities and special district governments. ([ada.gov](https://www.ada.gov/resources/2024-xx.xx-xx.xx-web-rule/))

5. Data Act explained
   · The Data Act applies from September xx.xx 2025, and its covered SaaS switching provisions address interfaces and export of customer-generated data. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/factpages/data-act-explained))
   · The prohibition on provider switching charges takes effect January xx.xx 2027; provider intellectual property and trade secrets are excluded from the specified switching-data scope. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/factpages/data-act-explained))
6. Frequently Asked Questions: Patents
   · WIPO explains that patents are territorial and that licensing rights depend on agreed purpose, territory and period; this does not establish any particular WaitTime patent's enforceable coverage. ([wipo.int](https://www.wipo.int/en/web/patents/faq_patents))

5.7. ESG & Sustainability Analysis

Accessible queues are a social-inclusion choice as well as an interface decision. Qmatic describes phone and online booking, kiosk or staff-assisted queue entry, voice announcements and multilingual options, with application-specific accessibility statements. ■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■ ■■■■■■■ ■■ ■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■ ■■■■■ ■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■

Environmental procurement can affect supplier eligibility without proving a product's environmental benefit. ■■■■■ ■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■ ■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ This is an access condition, not evidence that digitizing queues or adding analytics reduces a venue's net emissions; deployment-specific environmental claims require separate substantiation.

Sources & Evidence

1. Accessibility at Qmatic
   · Qmatic describes phone, online, kiosk and staff-assisted access, voice announcements, multilingual options and application-specific accessibility statements; these are offering declarations rather than deployment-wide assurance. ([qmatic.com](https://www.qmatic.com/resources/accessibility))
2. PPN 006: Taking account of Carbon Reduction Plans (HTML)
   · PPN xx.xx applies Carbon Reduction Plan conditions to relevant major central-government contracts under its scope, contract-value and proportionality provisions. ([gov.uk](https://www.gov.uk/government/publications/ppn-xx.xx-taking-account-of-carbon-reduction-plans-in-the-procurement-of-major-government-contracts/ppn-xx.xx-taking-account-of-carbon-reduction-plans-html))
   · The plan must cover the bidding entity; reliance on a parent organization's plan is permitted only under specified conditions. ([gov.uk](https://www.gov.uk/government/publications/ppn-xx.xx-taking-account-of-carbon-reduction-plans-in-the-procurement-of-major-government-contracts/ppn-xx.xx-taking-account-of-carbon-reduction-plans-html))

5.8. Disruption & Risk Scenarios

Physical improvements can remove a software application's original purpose. SEA attributes declining Spot Saver use to improved checkpoint arrangements and schedules retirement beginning November xx.xx 2026. ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

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Support responsiveness may not equal restoration of an event-critical function. Halo expressly distinguishes response from resolution, making unresolved service restoration a credible exposure rather than an observed outage. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪

Sources & Evidence

1. Guidelines 3/2019 on Processing of Personal Data Through Video Devices
   - The guidance identifies impact-assessment requirements for large-scale systematic monitoring of publicly accessible areas. Extending a use can therefore require renewed governance assessment rather than relying on camera access alone. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))

2. SEA Spot Saver | SEA Airport
   · The airport's explanation connects improved physical screening arrangements with declining necessity for this reservation service. It does not establish a category-wide retreat from virtual queuing. ([portseattle.org](https://www.portseattle.org/SEAspotsaver))
3. Crowd Connected Standard Terms and Conditions, Version 4.0, April 2026
   · The terms permit immediate termination for the specified uses without prior written consent. This is an evidenced contractual trigger, not a reported customer termination. ([crowdconnected.com](https://www.crowdconnected.com/legal/standard-terms-and-conditions.pdf))
4. Terms of Service - Halo Solutions
   · The support schedule expressly distinguishes response from resolution, grounding a hypothetical service-restoration disruption and the need for appropriate contractual escalation. ([halosolutions.com](https://www.halosolutions.com/terms-of-service-xx.xx/))
5. General Terms and Conditions of Sale and Delivery - Version August 2026
   · The framework permits termination of services or license rights following specified uncured distributor defaults. This establishes a contractual continuity exposure, not evidence that a default has occurred. ([qmatic.com](https://www.qmatic.com/hubfs/General%20Terms%20and%20Conditions%20of%20Sale%20and%20Delivery%xx.xx%xx.xx.2026%xx.xx-xx.xx.pdf))

5.9. Return on Investment & Cost-Benefit Analysis

For a planning sponsor, the economic benefit is the ability to change a consequential decision while change remains possible. LEGION's software and expert-service distinctions, compared with software-enabled architecture services such as Mott MacDonald's STEPS proposition, support a choice between retained revision capability and a bounded deliverable. ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■

For a service department, arrival management should be assessed against service completion rather than the visible waiting area alone. ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■ ■ ■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■ ■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ If those arrangements cannot change, a narrower information or arrival-management purchase may still be useful, but a workforce-substitution justification is not established.

■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ Commitment is more defensible when the required information supports an authorized action and the delivery obligations are agreed. Defer broader scope when it serves only hypothetical future users, or when the buyer cannot establish who will act on and maintain the additional information.

Sources & Evidence

1. LEGION | Bentley Systems
   · Bentley's distinction between software and expert-service entitlements grounds a qualitative comparison of retained revision control and purchased assistance. ([bentley.com](https://www.bentley.com/products/legion/))
2. Passenger Flow Metrics Project - Port of Seattle Commission Agenda Memorandum, April 26, 2022
   · The appraisal identifies construction, proprietary equipment, and installation scheduling as counterforces to broader tracking, while acknowledging its additional detail. These are qualitative cost-benefit mechanisms, not realized returns.
   ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
3. Queue management | Concierge
   · The product description establishes reception assistance and queue visibility, not realized workforce savings. Retained staffing is therefore a material qualitative benefit-realization condition.
   ([qmatic.com](https://www.qmatic.com/products/concierge))
4. Architecture | Mott MacDonald
   · The software-enabled architecture service provides a commercially distinct alternative to a buyer operating its own planning entitlement. The comparative economic conclusion is conditional analysis.
   ([mottmac.com](https://www.mottmac.com/en-us/markets-and-services/engineering/architecture/))
5. Airport software | Xovis
   · The included delivery services provide an alternative to buyer-coordinated component procurement, subject to the proposed order's responsibility allocation.
   ([xovis.com](https://www.xovis.com/technology/airport-software))

6. Cumulative Impact of Artificial Intelligence 2026

AI is commercially established in some monitoring deployments, but information production and operational action remain separate. ■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■ The case establishes deployment, not a generally replicable staffing reduction or completed visitor-guidance chain.

■■■■■■■■■■■■■■ ■■ ■■■■ ■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■ ■■■■■■■■■ ■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■ Service managers should assign responsibility for inaccurate guidance, human escalation and information maintenance before changing frontline staffing. The potential is to redirect routine inquiries; the counterforce is continuing responsibility for exceptions and accessible service.

Governance depends on intended use and jurisdiction. ■■ ■■ ■■■ ■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■ ■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■■■■■■■■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■ Buyers should contract accountability and workforce preparation alongside integration, rather than treat an AI feature as permission to automate consequential decisions.

Sources & Evidence

1. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
   · Cisco's December xx.xx 2022 announcement reports WaitTime's AI deployment at the Etihad Stadium using Meraki cameras, while describing digital-signage integration as prospective. ([newsroom.cisco.com](https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2022/m12/manchester-city-collaborates-with-cisco-to-deploy-crowd-intelligence-solution-waittime.html))
2. Qmatic Expands AI Portfolio with Qmatic AI Chat
   · Qmatic's June xx.xx 2026 AI Chat launch describes appointment and queue inquiries within its customer-journey offering; the announcement does not demonstrate customer adoption or realized labor savings. ([qmatic.com](https://www.qmatic.com/product-updates/qmatic-expands-ai-portfolio-with-qmatic-ai-chat))
3. 5 AI RMF Core
   · NIST identifies the AI Risk Management Framework as voluntary rather than a mandatory product authorization. ([airc.nist.gov](https://airc.nist.gov/airmf-resources/airmf/xx.xx-sec-core/))
   · Its governance outcomes address personnel training, human oversight, accountability and risks from third-party software and data. ([airc.nist.gov](https://airc.nist.gov/airmf-resources/airmf/xx.xx-sec-core/))

4. AI Act
   - The European Commission states that AI literacy obligations have applied since February xx.xx 2025. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/policies/regulatory-framework-ai))
   - Following the AI Omnibus entering into force on July xx.xx 2026, Annex III high-risk rules apply from December xx.xx 2027; classification depends on the intended use, including relevant biometric uses. ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/policies/regulatory-framework-ai))

7. Crowd Management Software Market, by Software Offering

[redacted] Transport for London's guidance also recognizes simpler static assessments alongside specialist dynamic modeling. Planning buyers should therefore establish the required assessment and project decision before procuring simulation capability; a live dashboard is not a substitute for evaluating a proposed design.

[redacted] Observing a queue does not establish the ability to allocate appointments, and validating tickets does not establish complete observation of an unrestricted site. Suppliers should identify which transaction or decision their contract actually controls.

Crowd Guidance and Communication Software addresses the public, whereas Crowd Operations Coordination Software addresses the teams responsible for action. Omnivex markets occupancy displays, wayfinding and emergency messages; Halo describes shared incident reporting and task coordination. [redacted]

Integrated Crowd Management Suites should be evaluated through their combined workflows and contractual scope. Qmatic describes Orchestra as modular, and InSite states that components can operate together or separately. [redacted]

Figure 8. Global Crowd Management Software Market Size, by Software Offering, 2025 (%)

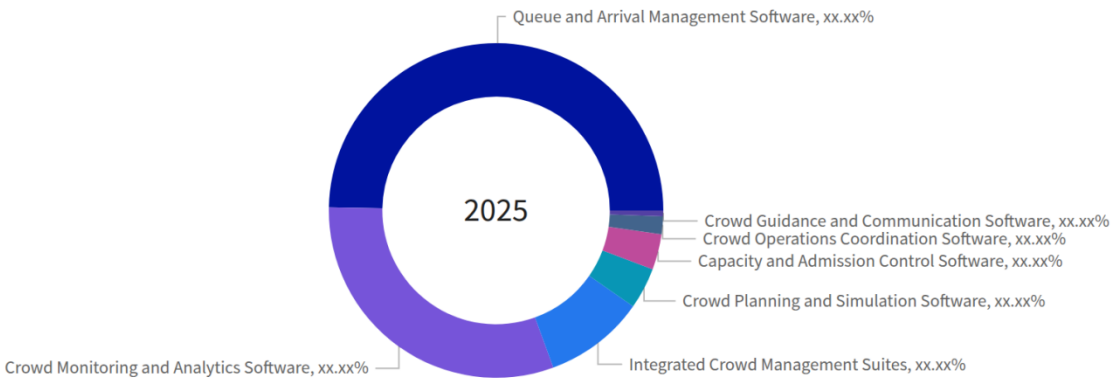

Figure 9. Global Crowd Management Software Market, by Software Offering, 2032 (USD Million)

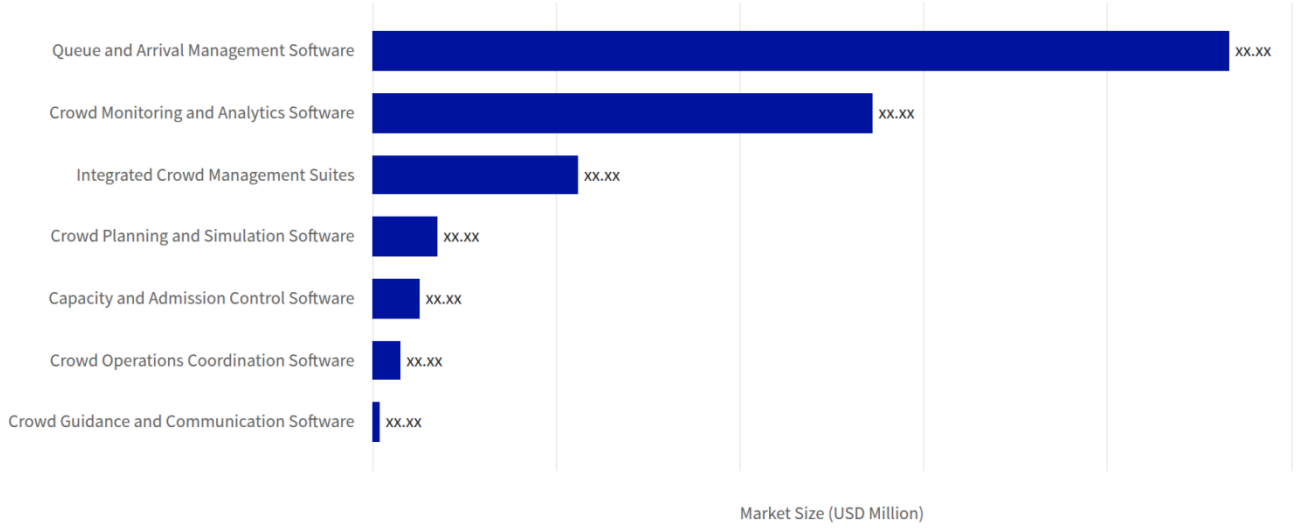

Table 4. Global Crowd Management Software Market, by Software Offering growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 5. Global Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. LEGION | Bentley Systems
   - Bentley markets LEGION for pedestrian design and operating-scenario comparison before implementation. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
2. Qmatic | FAQs
   - Qmatic describes appointment, queue and virtual-queue functions and identifies Orchestra as modular. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
3. Daily Operations - Halo Solutions
   - Halo markets shared incident management and task coordination across operating teams. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))
4. Event Access Control & Management - We are InSite
   - InSite markets ticket validation linked with capacity alerts and states that components can operate together or separately. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
5. Traffic Modelling Guidelines v4
   - TfL distinguishes static pedestrian assessment from specialist dynamic modeling and recognizes that a scheme may require either or both. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))
6. Leverage Digital Signage for Crowd Control | Omnivex
   - Omnivex markets occupancy information, wayfinding and emergency messaging through digital signage. ([omnivex.com](https://www.omnivex.com/solutions/applications/crowd-control))

7. Crowd controls inside the venue - HSE
   - HSE treats public information and staff command arrangements as separate crowd-management responsibilities. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
8. ISO 22353:2026 - Security and resilience - Guidelines for crowd management
   - Taxonomy evidence: The standard published in August 2026 addresses events, mass gatherings and crowded places, including capacity assessment, ingress, circulation, egress and emergency planning. It supports the physical crowd-management boundary, not a software-market classification or evidence of 2025 sales. ([iso.org](https://www.iso.org/standard/xx.xx.html))
9. Pathfinder Pricing
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
10. Qmatic Welcomes New CEO and Vice CEO
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

11. accesso Technology Group plc - Results for the six months ended 30 June 2026

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

12. People Counting System Pricing - Nano AI + BoostBI | V-Count

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))

13. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

14. 5 easy packages to buy Halo for venues
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
15. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

16. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

17. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

18. End of Life Announcement: Qmatic Show

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

19. Gentrack Group - FY25 Investor Presentation
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))

7.1. Queue and Arrival Management Software

Table 6. Global Crowd Management Software Market Size, by Queue and Arrival Management Software, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 7. Global Crowd Management Software Market Size, by Queue and Arrival Management Software, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 8. Global Crowd Management Software Market Size, by Queue and Arrival Management Software, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. QtracVR Virtual Queuing System

   · Taxonomy evidence: The technology description distinguishes registration into a virtual physical-service queue from standing in line. Its historical decision date and version-specific decision matrix must not be interpreted as current blanket authorization, active deployment or a completed software purchase. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))

   · Taxonomy evidence: The government technology record describes software allowing patients to register in virtual queues without standing in line, with staff processing requests across service areas. This directly distinguishes physical virtual queuing from measurement-only queue analytics. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))

2. RFP for procurement of Queue Management Solution

   · Taxonomy evidence: The bank's procurement scope explicitly seeks Queue Management Software for managing branch crowds, including token issuance and expected waiting information. The procurement combines software with implementation and maintenance, so its full contract value cannot be treated as software revenue. ([sbi.bank.in](https://sbi.bank.in/webfiles/uploads/files_2324/xx.xx-RFP_QMS%20Software_Solution_Ver-xx.xx.2_finalv2.pdf))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Qmatic Welcomes New CEO and Vice CEO
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
12. Qmatic | FAQs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))

13. accesso Technology Group plc - Results for the six months ended 30 June 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

7.2. Crowd Monitoring and Analytics Software

Table 9. Global Crowd Management Software Market Size, by Crowd Monitoring and Analytics Software, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 10. Global Crowd Management Software Market Size, by Crowd Monitoring and Analytics Software, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 11. Global Crowd Management Software Market Size, by Crowd Monitoring and Analytics Software, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Monitor the crowd

- Taxonomy evidence: The page identifies an April xx.xx 2025 update and distinguishes overall numbers, distribution and emerging crowd problems. It supports the monitoring functional rationale, not a requirement to buy software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
- Taxonomy evidence: The guidance distinguishes monitoring venue totals, crowd distribution and developing crowd problems. It supports linked counting, occupancy and distribution functions, not a software-sales partition. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

2. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022
   - Taxonomy evidence: The April xx.xx 2022 authorization request combines software, equipment, vendor services and license maintenance, with software and vendor services grouped together. It does not establish software-only value, a completed deployment or eventual entitlement terms. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Taxonomy evidence: The April 2022 memorandum requests procurement encompassing software licenses and maintenance for passenger-flow measurements, reporting and emerging-issue alerts. It establishes a buyer requirement, not proof of completed installation or software-only expenditure. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
3. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety
   - Taxonomy evidence: The acquired system's software viewer provides personnel with crowd updates and analysis, supporting monitoring software as a functional deliverable distinct from the underlying sensing equipment. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))
4. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

5. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

6. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
7. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
8. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

9. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
10. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
11. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
12. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
13. Gentrack Group - FY25 Investor Presentation
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))

7.3. Integrated Crowd Management Suites

Table 12. Global Crowd Management Software Market Size, by Integrated Crowd Management Suites, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 13. Global Crowd Management Software Market Size, by Integrated Crowd Management Suites, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 14. Global Crowd Management Software Market Size, by Integrated Crowd Management Suites, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. A holistic, scenario-independent, situation-awareness and guidance system for sustaining the Active Evacuation Route for large crowds - Final Report Summary

   · Taxonomy evidence: The final report for the project completed May xx.xx 2017 describes an integrated platform combining crowd monitoring, simulation, operational visualization, communication and guidance. It establishes a cross-functional system architecture and demonstrations, not a currently sold inseparable software suite. ([cordis.europa.eu](https://cordis.europa.eu/project/id/xx.xx/reporting/it))

2. AliudQ - One Platform for Visitor Flow, Communication and Insights

   · Taxonomy evidence: The inspected IAMP product presentation combines crowd functions, digital signage and analytics on a shared data model and offers standalone or combined solutions. It corroborates marketed integration, not contractual inseparability or the response's full market partition. (aliudq.com)

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
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    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Qmatic | FAQs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
12. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

13. 5 easy packages to buy Halo for venues

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

14. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

15. Digital Signage Software Pricing - ScreenCloud

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

16. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

17. Gentrack Group - FY25 Investor Presentation

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))

7.4. Crowd Planning and Simulation Software

Table 15. Global Crowd Management Software Market Size, by Crowd Planning and Simulation Software, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 16. Global Crowd Management Software Market Size, by Crowd Planning and Simulation Software, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 17. Global Crowd Management Software Market Size, by Crowd Planning and Simulation Software, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Traffic Modelling Guidelines v4

   · Taxonomy evidence: The September 2021 guidance distinguishes static pedestrian assessment from dynamic specialist-software modeling and allows their combined use. This supports retaining one planning-and-simulation offering family rather than assuming separate commercial entitlements for each method. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Taxonomy evidence: The September 2021 transport guidance distinguishes static pedestrian assessment from dynamic microsimulation using specialist software and describes comparisons of layouts and scenarios. It establishes a planning/modeling software function, not Global software-approval requirements or consultancy revenue. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

2. The provision of Microsimulation Traffic Modelling Software - 2025/S 000-069773

   · Taxonomy evidence: The October xx.xx 2025 tender seeks microscopic traffic software that expressly includes pedestrian modeling. Only attributable pedestrian or crowd-software functionality is within this market; the complete mixed traffic procurement is not. ([find-tender.service.gov.uk](https://www.find-tender.service.gov.uk/Notice/xx.xx-2025/PDF))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Pathfinder Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

12. LEGION | Bentley Systems
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))

7.5. Capacity and Admission Control Software

Table 18. Global Crowd Management Software Market Size, by Capacity and Admission Control Software, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 19. Global Crowd Management Software Market Size, by Capacity and Admission Control Software, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 20. Global Crowd Management Software Market Size, by Capacity and Admission Control Software, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Put crowd controls in place

   · Taxonomy evidence: The guidance treats entry, circulation and dispersal as distinct crowd-control phases and discusses arrangements when arrivals may exceed safe venue capacity. It supports capacity-constrained admission as a distinct management requirement, but does not independently establish a purchased software category or its value. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-controls.htm))

2. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

3. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
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- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
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- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. 5 easy packages to buy Halo for venues
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

11. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))

12. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

13. Event Access Control & Management - We are InSite

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

7.6. Crowd Operations Coordination Software

Table 21. Global Crowd Management Software Market Size, by Crowd Operations Coordination Software, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 22. Global Crowd Management Software Market Size, by Crowd Operations Coordination Software, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 23. Global Crowd Management Software Market Size, by Crowd Operations Coordination Software, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Crowd controls inside the venue
   - Taxonomy evidence: The control-point responsibilities include sharing crowd information, coordinating staff responses and coordinating external agencies. These support staff-facing crowd coordination as distinct from visitor messaging; they do not make general incident software wholly in scope. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
   - Taxonomy evidence: A central control point is described as coordinating information and responses among crowd-management staff and external bodies. This supports a distinct staff-facing coordination requirement, not proof that all general incident software belongs in the market. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
2. A holistic, scenario-independent, situation-awareness and guidance system for sustaining the Active Evacuation Route for large crowds - Final Report Summary
   - Taxonomy evidence: The demonstrated common operational picture connects decision makers, stewards and first responders, supporting crowd-specific coordination functionality distinct from visitor messaging. ([cordis.europa.eu](https://cordis.europa.eu/project/id/xx.xx/reporting/it))
3. AliudQ - One Platform for Visitor Flow, Communication and Insights
   - Taxonomy evidence: The presentation advertises operational task distribution alongside crowd-flow, capacity and waiting information. This supports marketed coordination functionality within that platform, but does not establish a separately priced crowd-coordination license or completed customer purchase. (aliudq.com)
4. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

5. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
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- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

6. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
7. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
8. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

9. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
10. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
11. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
12. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
13. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

7.7. Crowd Guidance and Communication Software

Table 24. Global Crowd Management Software Market Size, by Crowd Guidance and Communication Software, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 25. Global Crowd Management Software Market Size, by Crowd Guidance and Communication Software, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 26. Global Crowd Management Software Market Size, by Crowd Guidance and Communication Software, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Crowd controls inside the venue

· Taxonomy evidence: The guidance separately identifies information for visitors and staff command structures. Visitor-facing communication is therefore a distinct management requirement, although the guidance does not establish a purchased software entitlement. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

· Taxonomy evidence: The guidance identifies information and directions to visitors as crowd-management responsibilities, independently establishing demand for visitor-facing crowd communication rather than staff coordination alone. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

2. Crowd Control | Omnivex

   · Taxonomy evidence: The supplier's inspected software catalog markets crowd-control communication through occupancy information, congestion-aware directions, wayfinding and emergency messages. This corroborates its own commercially offered guidance functionality, independently aligned with crowd-safety communication requirements; it does not make all digital signage in scope. ([omnivex.com](https://www.omnivex.com/solutions/applications/crowd-control))

3. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

4. World Airport Traffic Forecasts 2024-2053 Executive Summary

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.

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   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.

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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Digital Signage Software Pricing - ScreenCloud
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))

8. Crowd Management Software Market, by Crowd Data Source

Crowd Data Source determines what the application can legitimately describe and which commercial dependencies the buyer must secure. ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ The purchasing prerequisite is an agreed planning question and usable input rights; adding operational feeds is not automatically necessary when the decision concerns a proposed layout.

Image and Video Data and Non-Imaging Sensor Data require different source verification, not assumptions based on a dashboard label. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ Where identifiable video is processed within the European data-protection framework, the intended purpose and lawful processing position must also be established; an aggregate output does not settle the status of its inputs.

Wireless Signal Data and Mobile Location Data are not interchangeable observation populations. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ An app-dependent route can support participant journeys while remaining unsuitable for a requirement to account for everyone in a space.

▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ Human reports can capture conditions that transaction records miss, but neither incident submissions nor recorded admissions should be treated as a complete account of all crowd behavior. The contract should identify the records included and who is responsible for maintaining them.

▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ Buyers should require source lineage, coverage boundaries, feed permissions and responsibility for overlapping records before committing. A narrower information combination is preferable when it answers

the funded question; broader integration is warranted only when the additional decision value justifies the additional dependencies.

Figure 10. Global Crowd Management Software Market Size, by Crowd Data Source, 2025 (%)

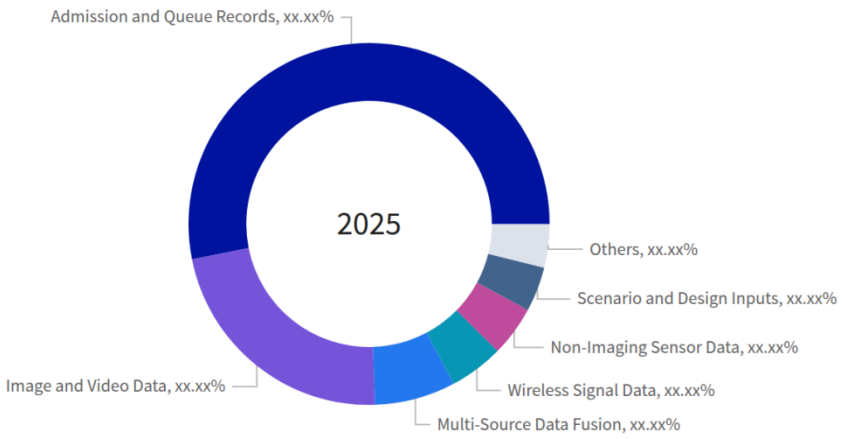

Figure 11. Global Crowd Management Software Market, by Crowd Data Source, 2032 (USD Million)

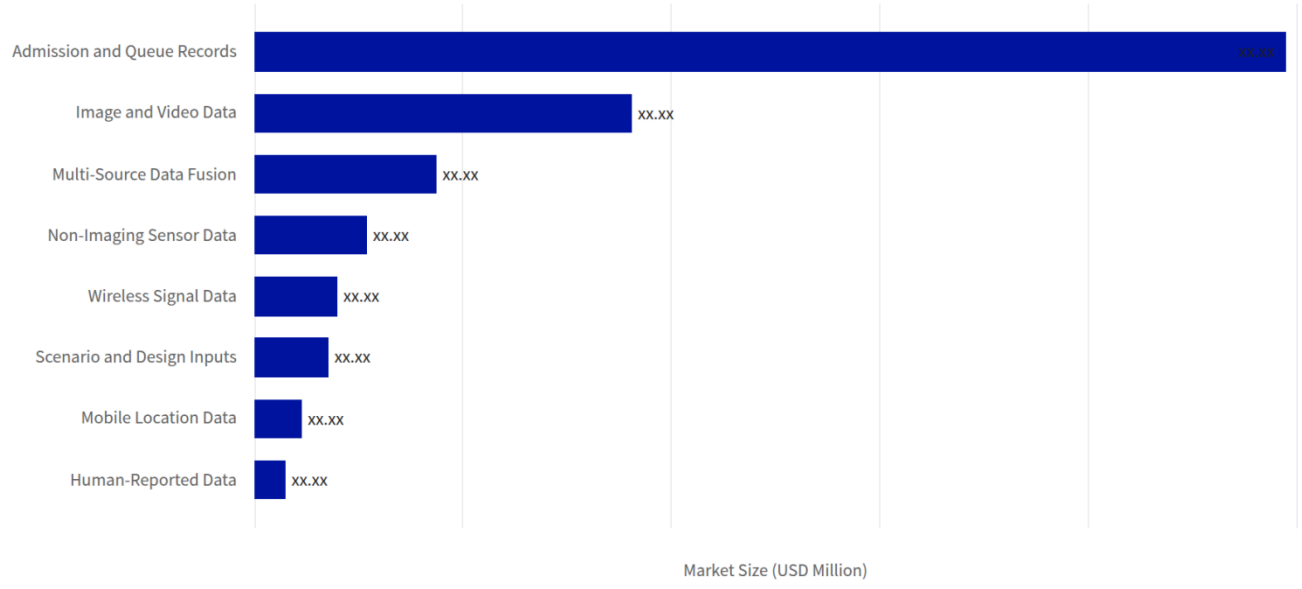

Table 27. Global Crowd Management Software Market, by Crowd Data Source growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 28. Global Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Daily Operations - Halo Solutions
   - Halo describes mobile reporting and updates, supporting human submissions as an application input. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))

2. Guidelines 3/2019 on Processing of Personal Data Through Video Devices

   · EDPB guidance requires specified processing purposes and distinguishes identifiable video information from information without reference to an identifiable person. This supports assessing inputs rather than relying on an aggregate display. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))

3. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis

   · Crowd Connected describes analytics derived through the customer's mobile app, establishing an app-dependent observation channel. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.

4. Event Access Control & Management - We are InSite

   · InSite's access software uses recorded ticket and entry events; its catalog also describes non-ticketed capacity reporting. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

5. Traffic Modelling Guidelines v4

   · The pedestrian guidance identifies layouts and pedestrian demand as assessment inputs. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.

6. Monitor the crowd - HSE

   · HSE recognizes cameras, sensors, thermal counting, admission-related records and staff observations as crowd-information routes; it does not classify every thermal product's imaging status. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

7. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

   · DASA's April xx.xx 2024 account reports Network Rail's acquisition for Waterloo and describes LiDAR tracking, cameras and a software viewer; this is a mixed system. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

8. Crowd monitoring sensor types

   · CityFlows distinguishes Wi-Fi/Bluetooth and RFID sensing from GPS and smartphone-location sources. This establishes recognizable input families, not paid adoption. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))

   · Taxonomy evidence: The research project's published sensor-family list distinguishes automatic counting, Wi-Fi/Bluetooth, GPS or smartphone location, and RFID sensing. It independently supports recognizable information-source distinctions, not the complete commercial partition or paid adoption. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))

   · Taxonomy evidence: The research consortium distinguishes automatic detection, Wi-Fi/Bluetooth sensing, GPS/smartphone location and RFID sensing as crowd-monitoring inputs. This supports recognizable source-family distinctions without prescribing the response's complete allocation rules or establishing commercial readiness. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))

9. Passenger Flow Metrics Project - Port of Seattle Commission Agenda Memorandum, April 26, 2022

   · The Port's 2022 proposal recommends consolidating new and existing sources over more extensive tracking, citing additional installation and scheduling burdens; it does not establish completed fusion. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.

10. Capturing engagement numbers - strand 1 report

    · Taxonomy evidence: The report published March xx.xx 2026 distinguishes mobile-app geolocation from deployable visual and signal sensing. These are research-program source distinctions, not worldwide commercial shares or evidence of 2025 sales. ([gov.uk](https://www.gov.uk/government/publications/capturing-engagement-numbers-strand-xx.xx-report/capturing-engagement-numbers-strand-xx.xx-report))

11. Pathfinder Pricing

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.

12. Qmatic Welcomes New CEO and Vice CEO

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.

13. People Counting System Pricing - Nano AI + BoostBI | V-Count

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.

14. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
15. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
16. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
17. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
18. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.

19. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
20. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
21. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
22. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
23. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.

24. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.

8.1. Admission and Queue Records

Table 29. Global Crowd Management Software Market Size, by Admission and Queue Records, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 30. Global Crowd Management Software Market Size, by Admission and Queue Records, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 31. Global Crowd Management Software Market Size, by Admission and Queue Records, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. QtracVR Virtual Queuing System
   - Taxonomy evidence: The described application records service registrations, unique call numbers and staff processing of requests. These support a transaction-record input category distinct from sensor-observed queue measurements. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))
   - Taxonomy evidence: The recorded application maintains service registrations, unique call numbers, queue requests and estimated waits. These are transactional queue-state records rather than observations from cameras or wireless sensors. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
2. Monitor the crowd
   - Taxonomy evidence: Turnstiles and computer-chipped tickets or wristbands are identified as counting-system inputs at entry and exit points. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Qmatic Welcomes New CEO and Vice CEO
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
12. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.

8.2. Image and Video Data

Table 32. Global Crowd Management Software Market Size, by Image and Video Data, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 33. Global Crowd Management Software Market Size, by Image and Video Data, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 34. Global Crowd Management Software Market Size, by Image and Video Data, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Monitor the crowd

   · Taxonomy evidence: CCTV cameras and drones are identified as sources of crowd-movement and distribution information.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

2. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022

   · Taxonomy evidence: Cameras are explicitly contemplated as a passenger-flow information source for the proposed licensed system.
   ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
12. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.

13. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
14. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

8.3. Multi-Source Data Fusion

Table 35. Global Crowd Management Software Market Size, by Multi-Source Data Fusion, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 36. Global Crowd Management Software Market Size, by Multi-Source Data Fusion, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 37. Global Crowd Management Software Market Size, by Multi-Source Data Fusion, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022

   · Taxonomy evidence: The request identifies possible wireless technology, smartphone location services or roadway cameras, while requiring consolidated measurements. Alternative candidate sources and consolidation do not prove substantive implemented fusion. ([[meetings.portseattle.org]](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

   · Taxonomy evidence: The proposed scope gathers and consolidates flow measurements from new and existing systems. It supports multisource integration as a buyer requirement without establishing the eventual feeds or their algorithmic fusion. ([[meetings.portseattle.org]](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.

2. Enhancing crowd monitoring system functionality through data fusion: Estimating flow rate from wi-fi traces and automated counting system data

   · Taxonomy evidence: The peer-reviewed 2020 study combines Wi-Fi traces and automated counting information from a large event to estimate pedestrian flow. It establishes substantive data fusion as distinct from single-source monitoring, not current worldwide software licensing or adoption. ([research.tudelft.nl](https://research.tudelft.nl/en/publications/enhancing-crowd-monitoring-system-functionality-through-data-fusi/))

3. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

4. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
12. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.

13. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.

8.4. Wireless Signal Data

Table 38. Global Crowd Management Software Market Size, by Wireless Signal Data, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 39. Global Crowd Management Software Market Size, by Wireless Signal Data, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 40. Global Crowd Management Software Market Size, by Wireless Signal Data, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Crowd monitoring sensor types

   · Taxonomy evidence: Wi-Fi, Bluetooth and RFID sensing are explicitly identified separately from GPS and smartphone location sources. The retained transaction-versus-tracking RFID rule remains an analytical allocation convention.
   ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))

   · Taxonomy evidence: Wi-Fi, Bluetooth and RFID are explicitly identified as sensing families for crowd-monitoring research. Their identification does not establish paid deployments or global market shares.
   ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))

2. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022

   · Taxonomy evidence: Existing airport wireless technology is explicitly contemplated as a passenger-flow information source.
   ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

3. Capturing engagement numbers - strand 1 report

   · Taxonomy evidence: Wi-Fi and radio-signal sensing are discussed as attendance-information sources but deprioritized for this research program because of deployment and accuracy concerns. The finding is not interpreted as absence of commercial crowd-density software using those sources.
   ([gov.uk](https://www.gov.uk/government/publications/capturing-engagement-numbers-strand-xx.xx-report/capturing-engagement-numbers-strand-xx.xx-report))

4. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

6. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
8. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

9. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
10. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
11. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
12. A Guide to the Passenger Movement Sensor Landscape
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.

8.5. Non-Imaging Sensor Data

Table 41. Global Crowd Management Software Market Size, by Non-Imaging Sensor Data, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 42. Global Crowd Management Software Market Size, by Non-Imaging Sensor Data, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 43. Global Crowd Management Software Market Size, by Non-Imaging Sensor Data, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Monitor the crowd

   · Taxonomy evidence: Thermal counting and people-counting sensors are named, but the page does not resolve whether a particular thermal implementation produces imagery. Ambiguous thermal products therefore require source-provenance evidence rather than automatic assignment. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

   · Taxonomy evidence: People-counting sensors and thermal counting are named monitoring inputs. This source does not establish whether a particular thermal implementation is imaging or non-imaging. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

2. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

   · Taxonomy evidence: The April xx.xx 2024 government publication reports Network Rail's acquisition of LiDAR-based crowd-monitoring technology and describes tracking units, cameras and a software viewer. It substantiates commercially acquired range-sensing-linked crowd software, while leaving software revenue within the mixed system unallocated. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
12. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.

8.6. Scenario and Design Inputs

Table 44. Global Crowd Management Software Market Size, by Scenario and Design Inputs, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 45. Global Crowd Management Software Market Size, by Scenario and Design Inputs, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 46. Global Crowd Management Software Market Size, by Scenario and Design Inputs, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Traffic Modelling Guidelines v4

   · Taxonomy evidence: The guidance treats spatial layouts and pedestrian demand as modeling inputs. Its local assessment requirements support the source-family rationale but do not prescribe the analytical precedence between scenario-only and observation-dependent workloads. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Taxonomy evidence: The guidance identifies spatial layouts and current or predicted pedestrian volumes as modeling inputs. This supports a design-and-demand input family; the response's scenario-only allocation precedence remains an analytical convention. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.

2. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. Pathfinder Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.

8.7. Mobile Location Data

Table 47. Global Crowd Management Software Market Size, by Mobile Location Data, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 48. Global Crowd Management Software Market Size, by Mobile Location Data, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 49. Global Crowd Management Software Market Size, by Mobile Location Data, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Crowd monitoring sensor types
   · Taxonomy evidence: GPS trackers and smartphone applications supplying location information are an explicit source family, independently supporting separation from venue network-signal sensing. ([cityflows-project.eu](https://www.cityflows-project.eu/crowd-monitoring-sensor-types/))
2. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022
   · Taxonomy evidence: Smartphone location services are identified separately from airport wireless infrastructure and cameras among the possible information sources. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
3. Capturing engagement numbers - strand 1 report
   · Taxonomy evidence: The report describes mobile applications supplying device-location information and distinguishes this from locally deployed crowd-sensing equipment. ([gov.uk](https://www.gov.uk/government/publications/capturing-engagement-numbers-strand-xx.xx-report/capturing-engagement-numbers-strand-xx.xx-report))

4. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
5. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

6. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
7. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
8. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

9. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
10. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
11. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
12. Location Analytics and Footfall Counting
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
13. About Crowd Connected
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.

8.8. Human-Reported Data

Table 50. Global Crowd Management Software Market Size, by Human-Reported Data, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 51. Global Crowd Management Software Market Size, by Human-Reported Data, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 52. Global Crowd Management Software Market Size, by Human-Reported Data, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Monitor the crowd

   · Taxonomy evidence: The guidance recognizes staff observations and manual counters as information sources. This supports human-reported inputs but does not establish currently purchased software principally dependent on them. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

   · Taxonomy evidence: Hand counters, field-staff observations and social-media monitoring are recognized crowd-information sources. This establishes the information need, not current paid human-report-led software contracts. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

2. A holistic, scenario-independent, situation-awareness and guidance system for sustaining the Active Evacuation Route for large crowds - Final Report Summary

   · Taxonomy evidence: The spectator application allows users to report incidents into the common operational picture. This supports human reports as a software information source in a demonstration, not proof of a paid predominantly human-report-led license.
   ([cordis.europa.eu](https://cordis.europa.eu/project/id/xx.xx/reporting/it))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
12. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.

9. Crowd Management Software Market, by Application

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■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ Buyers should connect the proposed application to the relevant responsible organization and information-sharing arrangements before accepting a combined safety proposition. An application can support those responsibilities without assuming them.

Flow and Queue Efficiency and Staffing and Resource Optimization can use the same observations but require different management authority. Singapore's IMDA identifies queue-length and waiting-time insights as a preferred retail solution feature supporting checkout processes and staff allocation. ■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■ ■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■ ■■ ■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■

Visitor Guidance and Experience requires delivery to the visitor, not only an internal display; Omnivex markets wayfinding and crowd-information messaging for that role. ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■ Combining these objectives can share information, but does not make their benefits equivalent or independently attributable.

Figure 12. Global Crowd Management Software Market Size, by Application, 2025 (%)

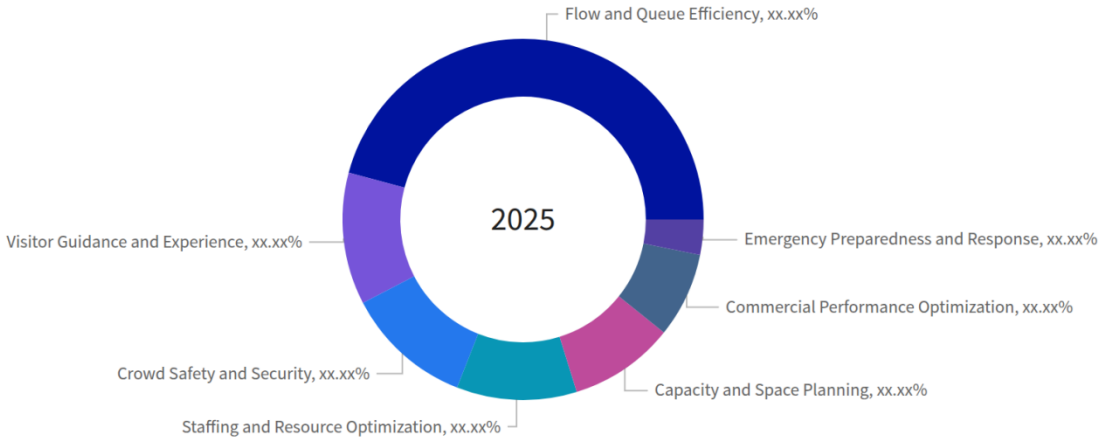

Figure 13. Global Crowd Management Software Market, by Application, 2032 (USD Million)

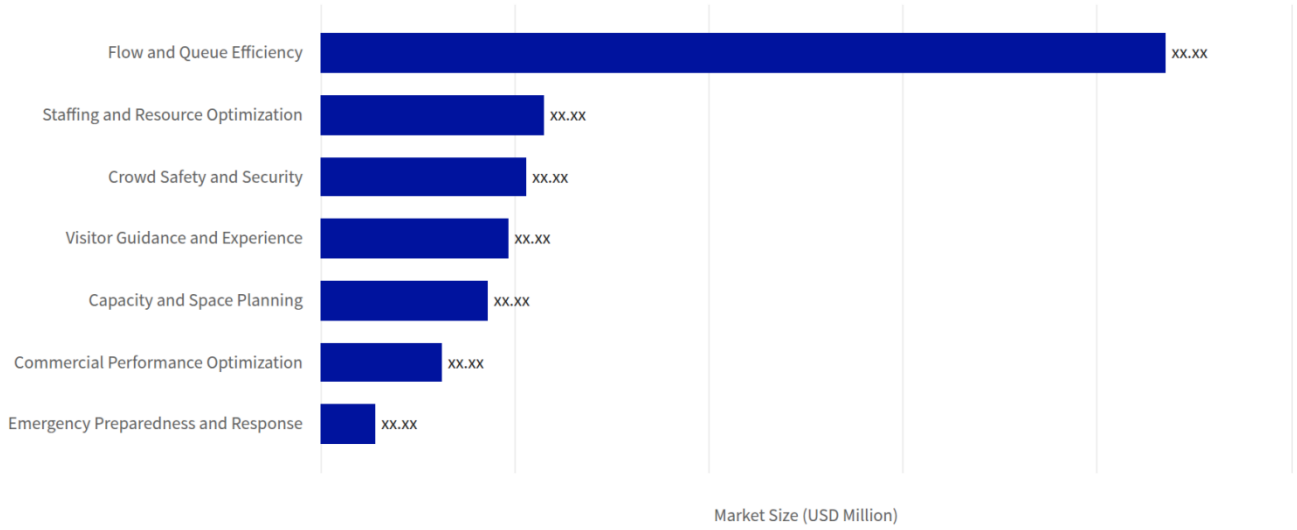

Table 53. Global Crowd Management Software Market, by Application growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 54. Global Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   · The supplier markets engagement and dwell reporting to sponsors, tenants and concessions, not demonstrated sales improvement.
   ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
2. Traffic Modelling Guidelines v4
   · TfL links pedestrian assessment to changes in walking space, routes, crossings and public-transport stations; this supports a planning objective within its local scope.
   ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))
3. Leverage Digital Signage for Crowd Control | Omnivex
   · The visitor-facing offering supports distinguishing information delivery from an internal operational display.
   ([omnivex.com](https://www.omnivex.com/solutions/applications/crowd-control))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
4. Crowd controls inside the venue - HSE
   · The guidance ties staffing, supervision and command structures to event circumstances rather than a software purchase.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
5. Monitor the crowd - HSE
   · HSE distinguishes monitoring total numbers, distribution and developing crowd problems, supporting the routine safety objective.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.

6. In-Store Analytics - Pre-Approval Onboarding Guide
   - IMDA's preferred Customer Queue Insights criterion links queue lengths and waiting times to checkout processes and staff allocation. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
7. Space Optimization Pilot Programs | Facilities
   - UCLA identifies space reallocation and traffic-informed custodial deployment as intended occupancy-data uses, not demonstrated application outcomes. ([facilities.ucla.edu](https://facilities.ucla.edu/programs/space-occupancy))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
8. Planning for incidents and emergencies - HSE
   - HSE separately addresses emergency planning, incident control, evacuation responsibilities and emergency-service coordination. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
9. ISO 22353:2026 - Security and resilience - Guidelines for crowd management
   - Taxonomy evidence: The standard distinguishes planned crowd management and emergencies while excluding intervention-oriented crowd control from its own scope. This supports keeping physical crowd objectives distinct from general enforcement services; it does not impose the retained application partition. ([iso.org](https://www.iso.org/standard/xx.xx.html))
10. Incorporating Technologies into Airport In-Terminal Concessions Programs: A Primer (2025)
    - Taxonomy evidence: The 2025 research distinguishes customer-service, queue, workforce, and commercial uses of passenger-flow information. These support distinct demand objectives, but not an official seven-category taxonomy. ([nationalacademies.org](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))

11. Pathfinder Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
12. accesso Technology Group plc - Results for the six months ended 30 June 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
13. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.

14. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
15. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
16. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
17. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

18. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.

9.1. Flow and Queue Efficiency

Table 55. Global Crowd Management Software Market Size, by Flow and Queue Efficiency, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 56. Global Crowd Management Software Market Size, by Flow and Queue Efficiency, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 57. Global Crowd Management Software Market Size, by Flow and Queue Efficiency, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. In-Store Analytics - Pre-Approval Onboarding Guide

   · Taxonomy evidence: The preferred queue-insights question explicitly links the information to checkout-process optimization, supporting an efficiency objective distinct from the input technology. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))

   · Taxonomy evidence: The Customer Queue Insights requirement links queue information to checkout-process optimization, supporting an efficiency objective. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.

2. RFP for procurement of Queue Management Solution

   · Taxonomy evidence: The RFP identifies a software deliverable for physical branch crowd management, supporting an operational queue application. It is a solicitation, not proof of a completed deployment. ([sbi.bank.in](https://sbi.bank.in/webfiles/uploads/files_2324/xx.xx-RFP_QMS%20Software_Solution_Ver-xx.xx.2_finalv2.pdf))

3. Incorporating Technologies into Airport In-Terminal Concessions Programs: A Primer (2025)
   · Taxonomy evidence: The research identifies reducing queues and bottlenecks as operational uses of passenger-flow information. ([nationalacademies.org](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
4. Hotel Productivity Benchmarking
   · Taxonomy evidence: The study describes redirecting guests between outlets to improve physical queue management, supporting the flow-efficiency application. ([apo-tokyo.org](https://www.apo-tokyo.org/wp-content/uploads/2023/xx.xx/Hotel-Productivity-Benchmarking.pdf))
5. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
   · Taxonomy evidence: The requested system is intended to improve patient flow and service efficiency, supporting a physical-flow application rather than appointment scheduling alone. ([tmclife.com](https://www.tmclife.com/tender/supply-delivery-installation-testing-commissioning-of-an-appointment-and-queue-management-system-aqms/))
6. The ICT Development Index 2024
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

7. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

8. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
9. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
10. EU structural financial indicators: end of 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

11. Who we are - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
12. Customer stories - Alliar Médicos à Frente
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
13. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
14. accesso Technology Group plc - Results for the six months ended 30 June 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
15. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
16. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.

17. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
18. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
19. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.

9.2. Visitor Guidance and Experience

Table 58. Global Crowd Management Software Market Size, by Visitor Guidance and Experience, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 59. Global Crowd Management Software Market Size, by Visitor Guidance and Experience, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 60. Global Crowd Management Software Market Size, by Visitor Guidance and Experience, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022
   · Taxonomy evidence: Passenger journey-time measurements are linked to Aviation Customer Experience objectives, supporting a visitor-experience application distinct from the underlying measurement technology. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
2. Incorporating Technologies into Airport In-Terminal Concessions Programs: A Primer (2025)
   · Taxonomy evidence: It separately identifies passengers' demand for queue-length information, supporting visitor-facing journey predictability. ([nationalacademies.org](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
3. Navigating a post circuit breaker Singapore with data driven tech
   · Taxonomy evidence: The crowd-information service was intended to help people choose less crowded places or visiting times, supporting crowd-aware visitor guidance. Its historical pandemic context is not treated as current regulatory demand. ([tech.gov.sg](https://www.tech.gov.sg/technews/navigating-a-post-circuit-breaker-sg))
4. Safe Distance @Parks: How AI replaced eye power for crowd counting
   · Taxonomy evidence: The public-facing park crowd-information application supports visitor decisions about crowded recreation spaces, providing an additional setting for the visitor-guidance application. ([tech.gov.sg](https://www.tech.gov.sg/technews/safe-distance-at-nparks/))

5. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
6. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

7. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
8. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
9. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

10. Who we are - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
11. Customer stories - Alliar Médicos à Frente
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
12. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
13. accesso Technology Group plc - Results for the six months ended 30 June 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
15. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

16. accesso Technology Group plc - Annual Report and Accounts 2023
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.

9.3. Crowd Safety and Security

Table 61. Global Crowd Management Software Market Size, by Crowd Safety and Security, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 62. Global Crowd Management Software Market Size, by Crowd Safety and Security, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 63. Global Crowd Management Software Market Size, by Crowd Safety and Security, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Monitor the crowd

   · Taxonomy evidence: HSE identifies crowd-number estimation and crowd-distribution monitoring as inputs to maintaining safe conditions. This establishes the safety decision need, not a requirement to purchase software or proof of supplier revenue.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-monitoring.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.

2. Safety Essentials

   · Taxonomy evidence: The control-point functions include monitoring spectator ingress and crowd disorder, supporting routine crowd-safety and security objectives.
   ([sgsa.org.uk](https://sgsa.org.uk/wp-content/uploads/2023/xx.xx/Safety-Essentials.pdf))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.

9.4. Staffing and Resource Optimization

Table 64. Global Crowd Management Software Market Size, by Staffing and Resource Optimization, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 65. Global Crowd Management Software Market Size, by Staffing and Resource Optimization, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 66. Global Crowd Management Software Market Size, by Staffing and Resource Optimization, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. In-Store Analytics - Pre-Approval Onboarding Guide

   · Taxonomy evidence: Staff allocation is separately identified as an intended use of queue-length and waiting-time insights. Its presence supports a distinct resource-allocation objective, not a measured purchase allocation. ([[preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics)](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))

   · Taxonomy evidence: The same requirement separately identifies staff allocation as an intended use of queue and waiting-time information. ([[preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics)](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.

2. Incorporating Technologies into Airport In-Terminal Concessions Programs: A Primer (2025)

   · Taxonomy evidence: Predictive passenger-flow information can inform concession staffing, stocking schedules, and operating hours, supporting resource-allocation objectives. ([[nationalacademies.org](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx)](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))

3. Hotel Productivity Benchmarking

   · Taxonomy evidence: It identifies deploying additional staff in response to outlet queue patterns as a crowd-management use, supporting the resource-optimization application. ([apo-tokyo.org](https://www.apo-tokyo.org/wp-content/uploads/2023/xx.xx/Hotel-Productivity-Benchmarking.pdf))

4. Space Optimization Pilot Programs | Facilities

   · Taxonomy evidence: Flexible deployment of custodial teams to higher-traffic locations is an explicitly identified use, supporting occupancy-informed staffing and service-resource decisions. ([facilities.ucla.edu](https://facilities.ucla.edu/programs/space-occupancy))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.

5. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

6. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
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- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
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- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

7. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
8. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
9. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

10. Who we are - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
11. Customer stories - Alliar Médicos à Frente
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
12. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
13. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
15. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

9.5. Capacity and Space Planning

Table 67. Global Crowd Management Software Market Size, by Capacity and Space Planning, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 68. Global Crowd Management Software Market Size, by Capacity and Space Planning, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 69. Global Crowd Management Software Market Size, by Capacity and Space Planning, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Traffic Modelling Guidelines v4

   · Taxonomy evidence: The pedestrian-modeling chapter addresses assessment of schemes affecting pedestrian movement, including station environments and surface transport hubs. It supports capacity and layout planning as a distinct demand objective; London's requirements are not treated as Global regulation. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

2. The provision of Microsimulation Traffic Modelling Software - 2025/S 000-069773

   · Taxonomy evidence: The requested capability supports infrastructure optimization and future-development planning, providing buyer-side support for the capacity-and-space-planning objective. ([find-tender.service.gov.uk](https://www.find-tender.service.gov.uk/Notice/xx.xx-2025/PDF))

3. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022
   - Taxonomy evidence: The proposed system would assess impacts from future construction projects, supporting planning decisions in addition to live operational monitoring. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
4. Space Optimization Pilot Programs | Facilities
   - Taxonomy evidence: The program identifies reallocation of underused space as an intended use of occupancy information, supporting capacity and space planning. Energy-only applications described on the page are outside the retained crowd-software boundary. ([facilities.ucla.edu](https://facilities.ucla.edu/programs/space-occupancy))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
5. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
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6. World Airport Traffic Forecasts 2024-2053 Executive Summary
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11. Customer stories - Alliar Médicos à Frente
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
12. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
13. Pathfinder Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
14. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.

15. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.

9.6. Commercial Performance Optimization

Table 70. Global Crowd Management Software Market Size, by Commercial Performance Optimization, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 71. Global Crowd Management Software Market Size, by Commercial Performance Optimization, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 72. Global Crowd Management Software Market Size, by Commercial Performance Optimization, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Incorporating Technologies into Airport In-Terminal Concessions Programs: A Primer (2025)
   · Taxonomy evidence: The report describes using localized passenger-flow information with sales activity to understand commercial capture and inform trading decisions. Inclusion here is restricted analytically to identifiable crowd-operational software, not advertising-only analytics. ([nationalacademies.org](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
2. The ICT Development Index 2024
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

3. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. accesso Technology Group plc - Results for the six months ended 30 June 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
11. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
12. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

13. accesso Technology Group plc - Annual Report and Accounts 2023
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.

9.7. Emergency Preparedness and Response

Table 73. Global Crowd Management Software Market Size, by Emergency Preparedness and Response, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 74. Global Crowd Management Software Market Size, by Emergency Preparedness and Response, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 75. Global Crowd Management Software Market Size, by Emergency Preparedness and Response, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Planning for incidents and emergencies

   · Taxonomy evidence: The guidance updated January xx.xx 2026 expressly identifies emergency crowd management, evacuation and incident control. This refresh supports distinguishing emergency-specific objectives from routine crowd safety without treating the guidance as software-adoption evidence. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))

   · Taxonomy evidence: HSE distinguishes emergency planning, evacuation, incident control, and emergency-service coordination from normal event operation. These are emergency-specific business requirements; the guidance does not itself establish commercial software adoption. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.

2. ST0859/AP01

   · Taxonomy evidence: Evacuation modeling is identified as part of fire-safety engineering assessment, supporting an emergency-preparedness application distinct from routine circulation efficiency. ([skillsengland.education.gov.uk](https://skillsengland.education.gov.uk/media/xx.xx/st0859_fire-safety-engineer_l6_epa_cycle_30_for-publishing.pdf))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Pathfinder Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
12. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.

10. Crowd Management Software Market, by End User

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Leisure Attractions and Cultural Institutions should distinguish an admission-control replacement from a broader visitor-information purchase. InSite's access catalog demonstrates ticket validation, capacity management and separable components, but not a purchase by every attraction or museum. ■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■ ■ ■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■ ■ ■■■■■■■ ■■■■■■■■■■

Education and Libraries can involve institutional space governance rather than a frontline queue budget. UCLA describes an occupancy pilot with facilities, technology and senior institutional oversight; that is not evidence of a library procurement or a completed broader rollout. ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■ ■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■ ■■■ ■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■

Finance and Insurance can impose a distinct qualification barrier. ■■■■■ ■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■ ■■■■ ■■■■■■■■■■■■■ ■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ Entrants should establish whether the proposed contracting entity qualifies before investing in a bid; this historical requirement is not a universal banking rule.

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Operators require a similarly explicit people-flow requirement: general asset monitoring or industrial software capability does not establish a crowd-software entitlement. A proposed workforce or visitor-flow purchase should identify the benefiting operating unit and its licensed functions before sector entry is treated as commercially accessible.

Government and Public Safety includes administrative service buyers and public-response organizations with different responsibilities. HSE distinguishes event-organizer duties from emergency-service coordination. ▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪

Religious and Membership Organizations and Personal Services have identifiable targeted offerings without implying uniform adoption. Traf-Sys markets church attendance reporting, while Qwaiting markets combined appointments and walk-in queues for barbershops and salons. ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪

Figure 14. Global Crowd Management Software Market Size, by End User, 2025 (%)

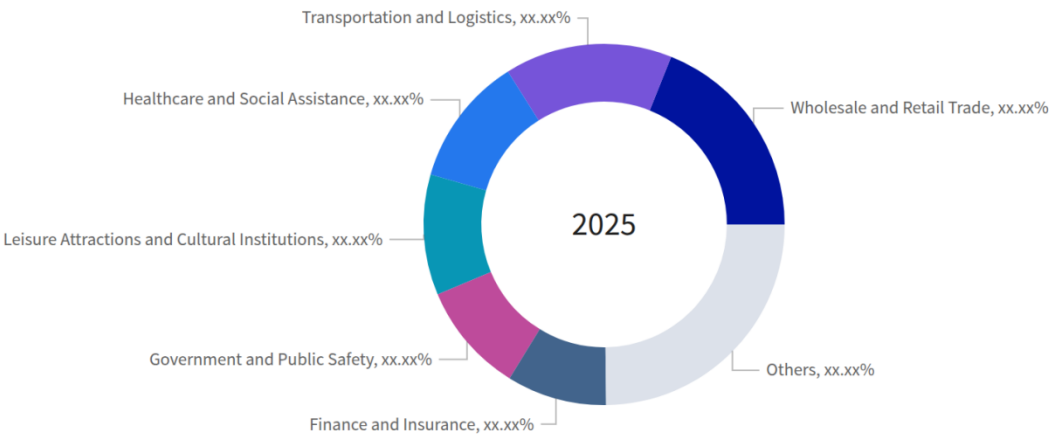

Figure 15. Global Crowd Management Software Market, by End User, 2032 (USD Million)

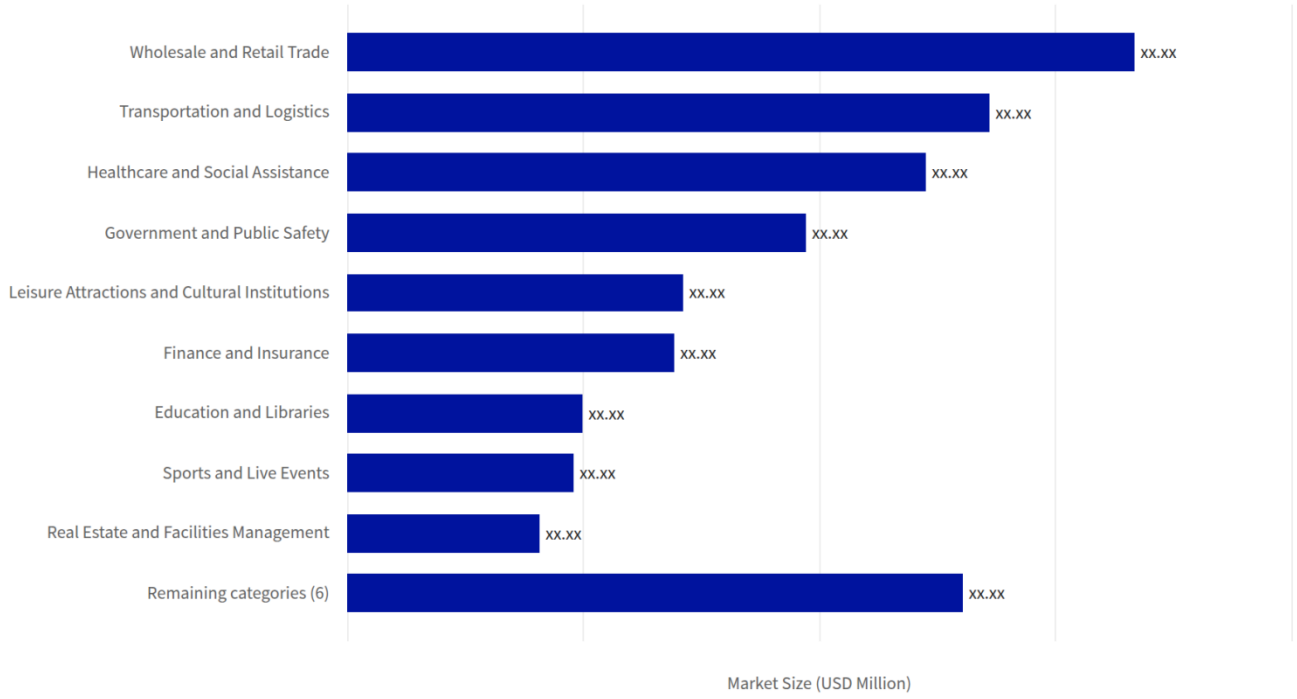

Table 76. Global Crowd Management Software Market, by End User growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 77. Global Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Daily Operations - Halo Solutions
   - Halo targets facilities and security teams and describes service-provider coordination across client deliverables. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))
2. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   - Concessions are identified as report recipients; that description does not establish that each recipient licenses the application. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
3. Event Access Control & Management - We are InSite
   - The catalog establishes admission and capacity offerings, not purchases by every attraction or cultural institution. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

4. Fact Sheet: New Rule on the Accessibility of Web Content and Mobile Apps Provided by State and Local Governments

   · DOJ explains that contractor-provided scheduling and reservation interfaces generally remain covered by the state and local-government web-accessibility rule, subject to applicable provisions; outsourcing does not create a general third-party exception. ([ada.gov](https://www.ada.gov/resources/2024-xx.xx-xx.xx-web-rule/))

5. Crowd controls inside the venue - HSE

   · HSE's event guidance establishes command and supervisory responsibilities relevant to live-event operators, not confirmed software adoption.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

6. Passenger Flow Metrics Project - Port of Seattle Commission Agenda Memorandum, April 26, 2022

   · The airport proposal identifies operations, technology, business intelligence and maintenance participation in procurement and delivery.
   ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.

7. In-Store Analytics - Pre-Approval Onboarding Guide

   · The retail criterion is preferred rather than mandatory; it establishes a solution-program distinction, not a universal purchasing requirement.
   ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.

8. Space Optimization Pilot Programs | Facilities

   · The university describes a pilot with institutional oversight and facilities and technology involvement; its account does not establish a library procurement or completed broader rollout.
   ([facilities.ucla.edu](https://facilities.ucla.edu/programs/space-occupancy))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

9. Planning for incidents and emergencies - HSE

   · HSE distinguishes event organizers, fixed-premises venue management and emergency services, requiring clarity about their respective responsibilities.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))

10. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE

    · Thomson Hospitals Sdn Bhd's invitation, opened February xx.xx 2026 and scheduled to close March xx.xx 2026, seeks an appointment and queue-management system for patient flow and hospital operations. It is a solicitation, not an award record. ([tmclife.com](https://www.tmclife.com/tender/supply-delivery-installation-testing-commissioning-of-an-appointment-and-queue-management-system-aqms/))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

11. Responses to Pre-Bid Queries - RFP No. SBI/CC/RNWM/QMS/2024-25/001

    · State Bank of India's 2024 clarification retains the requirement for three years of queue-management software or service experience despite a bidder's request to rely on broader financial-sector experience and its software partner. ([sbi.co.in](https://sbi.co.in/webfiles/uploads/files_2425/xx.xx-RFP%20Reponse%20to%20Pre-Bid%20Queries.pdf))

12. Simulating pedestrian vision and wayfinding with Oasys MassMotion

    · Oasys describes Efficiency Lab for Architecture using MassMotion for the Avenues Early Learning Centre project, establishing a reported professional-user role rather than the building operator's license. ([oasys-software.com](https://www.oasys-software.com/case-study/pedestrian-vision-modelling-massmotion/))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.

13. Church Attendance Counters | Traf-Sys

    · Traf-Sys markets church attendance reporting for attendance, resource and space-planning decisions. This is a targeted offering, not proof of a particular church's purchase. ([trafsys.com](https://www.trafsys.com/industries/churches/))

14. Telecom Company GTA Redefines its Customer Experience with Qmatic

    · Qmatic's GTA case describes branch queue, appointment and reporting functions and reports acquisition through VisualCom in New Caledonia. This is a supplier account of its own commercial relationship, not sector-wide adoption evidence. ([qmatic.com](https://www.qmatic.com/customer-stories/gta))

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.

15. Barbershop Queue Management | Salon Appointment Booking

    · Qwaiting markets combined bookings and walk-in queues for barbershops and salons. The catalog establishes targeted functions rather than a named customer's purchase. ([qwaiting.com](https://qwaiting.com/industries/barbershop-queue-system))

16. ISO 22353:2026 - Security and resilience - Guidelines for crowd management

    · Taxonomy evidence: The abstract identifies organizers, rights holders, hosts, venue operators and emergency services as stakeholders. These are stakeholder roles, not automatically separate buyer sectors or confirmed software customers. ([iso.org](https://www.iso.org/standard/xx.xx.html))

17. 2022 NAICS Manual

- Taxonomy evidence: The manual states that ownership generally does not determine industry classification and distinguishes government program administration from operating activities. This supports the buyer-axis operating-activity rule, not crowd-software adoption. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
- Taxonomy evidence: NAICS distinguishes operating industries from public administration, including publicly operated hospitals and transport facilities. It provides classification references, not crowd-software demand estimates. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))

18. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.

19. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

20. People Counting System Pricing - Nano AI + BoostBI | V-Count

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software fee range constrains the common monitoring unit economics; religious-campus channel counts and paid conversion remain assumptions.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software fee range constrains the common monitoring unit economics; religious-campus channel counts and paid conversion remain assumptions.

21. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.

22. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

23. Retail Analytics Company | Who We Are | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.

24. Xovis - Swiss precision measures people flows worldwide

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.

25. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
26. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
27. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
28. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
29. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
30. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

31. Intuitive appointment scheduling at Sgro's Barbershop | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
32. Attendee tracking | Real-time event attendance and session data
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

10.1. Wholesale and Retail Trade

Table 78. Global Crowd Management Software Market Size, by Wholesale and Retail Trade, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 79. Global Crowd Management Software Market Size, by Wholesale and Retail Trade, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 80. Global Crowd Management Software Market Size, by Wholesale and Retail Trade, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual
   - Taxonomy evidence: Wholesale and retail trade have distinct operating-sector classifications. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
2. In-Store Analytics - Pre-Approval Onboarding Guide
   - Taxonomy evidence: Customer Queue Insights is a preferred, not mandatory, solution-program question covering queue lengths and waiting times. It establishes official recognition of retail queue functionality, not universal requirements or an awarded customer contract. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))
   - Taxonomy evidence: IMDA's retail solution requirements explicitly include queue-length and waiting-time insights for optimizing checkout processes. This is category-level retail demand evidence, not a disclosed customer award. ([preapproval-guide.imda.gov.sg](https://preapproval-guide.imda.gov.sg/pre-approval-guide/stage-xx.xx-vendor-self-assessment/identify-suitable-solution-category/retail/in-store-analytics))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
12. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.

13. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
14. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.

10.2. Transportation and Logistics

Table 81. Global Crowd Management Software Market Size, by Transportation and Logistics, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 82. Global Crowd Management Software Market Size, by Transportation and Logistics, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 83. Global Crowd Management Software Market Size, by Transportation and Logistics, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Traffic Modelling Guidelines v4

   · Taxonomy evidence: The guidance explicitly covers pedestrian assessment around rail stations and public transport facilities, supporting the passenger-transport portion of the buyer grouping rather than freight or warehousing adoption. ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

2. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022

   · Taxonomy evidence: The April xx.xx 2022 Port of Seattle memorandum requests procurement authority for passenger-flow measurement software, equipment, services, and maintenance for airport operations. It identifies airport operating demand, while its combined expenditure cannot be treated wholly as software revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.

10.3. Healthcare and Social Assistance

Table 84. Global Crowd Management Software Market Size, by Healthcare and Social Assistance, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 85. Global Crowd Management Software Market Size, by Healthcare and Social Assistance, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 86. Global Crowd Management Software Market Size, by Healthcare and Social Assistance, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. QtracVR Virtual Queuing System

   · Taxonomy evidence: The description concerns patient service requests and multiple service areas, supporting the healthcare operating context without establishing software-only revenue or present approval status. ([oit.va.gov](https://oit.va.gov/Services/TRM/ToolPage.aspx?tid=xx.xx))

2. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE

   · Taxonomy evidence: The invitation identifies Thomson Hospitals Sdn Bhd as the owner seeking an appointment and queue-management system for hospital use. Its stated objectives include patient flow and real-time queue management; the invitation does not establish an award. ([tmclife.com](https://www.tmclife.com/tender/supply-delivery-installation-testing-commissioning-of-an-appointment-and-queue-management-system-aqms/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

3. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Qmatic Welcomes New CEO and Vice CEO
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.

10.4. Leisure Attractions and Cultural Institutions

Table 87. Global Crowd Management Software Market Size, by Leisure Attractions and Cultural Institutions, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 88. Global Crowd Management Software Market Size, by Leisure Attractions and Cultural Institutions, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 89. Global Crowd Management Software Market Size, by Leisure Attractions and Cultural Institutions, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual
   - Taxonomy evidence: Museums, historical sites, and amusement or recreation operations are identifiable activities. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
2. Safe Distance @Parks: How AI replaced eye power for crowd counting
   - Taxonomy evidence: GovTech's October xx.xx 2021 account describes an application supporting crowd-level assessment in public parks. It establishes the recreation setting, not commercial software purchasing or present deployment continuity. ([tech.gov.sg](https://www.tech.gov.sg/technews/safe-distance-at-nparks/))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. accesso Technology Group plc - Results for the six months ended 30 June 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
12. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.

10.5. Government and Public Safety

Table 90. Global Crowd Management Software Market Size, by Government and Public Safety, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 91. Global Crowd Management Software Market Size, by Government and Public Safety, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 92. Global Crowd Management Software Market Size, by Government and Public Safety, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual
   · Taxonomy evidence: Government airport operation is distinguished from transportation-program administration; schools and healthcare operating establishments are also classified outside public administration. Public ownership therefore does not alone place these operators in this buyer category. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
2. The provision of Microsimulation Traffic Modelling Software - 2025/S 000-069773
   · Taxonomy evidence: The contracting authority is a municipal council seeking software for its own planning work, supporting a public-administration buyer role. The notice is intended procurement, not evidence of a completed award. ([find-tender.service.gov.uk](https://www.find-tender.service.gov.uk/Notice/xx.xx-2025/PDF))
3. Navigating a post circuit breaker Singapore with data driven tech
   · Taxonomy evidence: GovTech describes a government-developed service combining participating operators' crowd-level information for public use. It establishes a public coordination role, but not an externally purchased commercial software entitlement. ([tech.gov.sg](https://www.tech.gov.sg/technews/navigating-a-post-circuit-breaker-sg))

4. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
5. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

6. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
7. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
8. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

9. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
10. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
11. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
12. Qmatic Welcomes New CEO and Vice CEO
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.

10.6. Finance and Insurance

Table 93. Global Crowd Management Software Market Size, by Finance and Insurance, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 94. Global Crowd Management Software Market Size, by Finance and Insurance, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 95. Global Crowd Management Software Market Size, by Finance and Insurance, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual
   - Taxonomy evidence: Finance and insurance form a distinct sector. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
2. RFP for procurement of Queue Management Solution
   - Taxonomy evidence: State Bank of India's March xx.xx 2024 RFP expressly proposes procuring queue-management software to manage crowds at branches. It establishes a financial institution as the intended software customer, not merely a payer or distribution partner. ([sbi.bank.in](https://sbi.bank.in/webfiles/uploads/files_2324/xx.xx-RFP_QMS%20Software_Solution_Ver-xx.xx.2_finalv2.pdf))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
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4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Qmatic Welcomes New CEO and Vice CEO
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
12. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.

10.7. Sports and Live Events

Table 96. Global Crowd Management Software Market Size, by Sports and Live Events, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 97. Global Crowd Management Software Market Size, by Sports and Live Events, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 98. Global Crowd Management Software Market Size, by Sports and Live Events, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Planning for incidents and emergencies

   · Taxonomy evidence: The guidance distinguishes event organizers and fixed-premises venue management from emergency services. It supports different operating roles but does not establish their respective software entitlements or expenditure.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))

   · Taxonomy evidence: The guidance assigns responsibilities to event organizers and fixed-premises venue management and identifies their interfaces with emergency services. This supports an event-operator buyer role distinct from public emergency agencies.
   ([hse.gov.uk](https://www.hse.gov.uk/event-safety/incidents-and-emergencies.htm))

2. Safety Essentials

   · Taxonomy evidence: The sports-ground guidance describes control-point responsibilities for monitoring spectator numbers, crowd disorder, safety, and incident response. It establishes sports-ground operating demand, not a separately attributable software purchase.
   ([sgsa.org.uk](https://sgsa.org.uk/wp-content/uploads/2023/xx.xx/Safety-Essentials.pdf))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
12. Attendee tracking | Real-time event attendance and session data
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

10.8. Education and Libraries

Table 99. Global Crowd Management Software Market Size, by Education and Libraries, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 100. Global Crowd Management Software Market Size, by Education and Libraries, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 101. Global Crowd Management Software Market Size, by Education and Libraries, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual
   - Taxonomy evidence: Libraries are classified separately from educational services; their combination here is analytical. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
2. Invitation for Bid - Attleboro Public Schools IP Video Surveillance System
   - Taxonomy evidence: The specification belongs to Attleboro Public Schools and includes people counting within a broader video-surveillance procurement. It supports an education operating context, not attribution of the whole security system to crowd software. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))
3. Space Optimization Pilot Programs | Facilities
   - Taxonomy evidence: UCLA describes a campus occupancy pilot and planned dashboards reporting building, floor, and zone use. This establishes an institutional operating context, not confirmed commercial software licensing or a completed broader rollout. ([facilities.ucla.edu](https://facilities.ucla.edu/programs/space-occupancy))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

4. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
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6. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
8. EU structural financial indicators: end of 2024
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
10. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
11. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.

10.9. Professional and Business Services

Table 102. Global Crowd Management Software Market Size, by Professional and Business Services, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 103. Global Crowd Management Software Market Size, by Professional and Business Services, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 104. Global Crowd Management Software Market Size, by Professional and Business Services, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual

   · Taxonomy evidence: The manual distinguishes complete operation of a client's business from facilities support and individual support services. This supports separating professional-service customers from operating clients and independent facilities operators. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))

   · Taxonomy evidence: Professional, engineering, security, and administrative-service activities are separately identifiable. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))

2. ST0859/AP01

   · Taxonomy evidence: The official fire-safety-engineer assessment plan includes using and evaluating evacuation-modeling software in engineering design work. It supports a professional-user role, not a specific software purchase or resale arrangement. ([skillsengland.education.gov.uk](https://skillsengland.education.gov.uk/media/xx.xx/st0859_fire-safety-engineer_l6_epa_cycle_30_for-publishing.pdf))

3. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

4. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
12. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.

10.10. Real Estate and Facilities Management

Table 105. Global Crowd Management Software Market Size, by Real Estate and Facilities Management, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 106. Global Crowd Management Software Market Size, by Real Estate and Facilities Management, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 107. Global Crowd Management Software Market Size, by Real Estate and Facilities Management, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual

   · Taxonomy evidence: Facilities support services and nonresidential property management have explicit classifications. Their combination here is analytical and does not establish a qualifying software purchase. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))

   · Taxonomy evidence: Property leasing and management are distinguished from retailing. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))

2. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

3. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
11. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

12. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
13. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.

10.11. Accommodation and Food Services

Table 108. Global Crowd Management Software Market Size, by Accommodation and Food Services, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 109. Global Crowd Management Software Market Size, by Accommodation and Food Services, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 110. Global Crowd Management Software Market Size, by Accommodation and Food Services, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

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   · Taxonomy evidence: Airport concession operators are identified as users of passenger-flow information for their own business planning, distinct from airport operating authorities. ([nationalacademies.org](https://www.nationalacademies.org/read/xx.xx/chapter/xx.xx))
2. Hotel Productivity Benchmarking
   · Taxonomy evidence: The intergovernmental study identifies crowd-management tools within hotel food-and-beverage operations and discusses operational use of queue analytics. Its surveyed-city findings are not treated as Global adoption rates. ([apo-tokyo.org](https://www.apo-tokyo.org/wp-content/uploads/2023/xx.xx/Hotel-Productivity-Benchmarking.pdf))

3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.

10.12. Information and Telecommunications

Table 111. Global Crowd Management Software Market Size, by Information and Telecommunications, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 112. Global Crowd Management Software Market Size, by Information and Telecommunications, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 113. Global Crowd Management Software Market Size, by Information and Telecommunications, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual

   · Taxonomy evidence: Publishing and telecommunications are identifiable information-sector activities. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))

2. The ICT Development Index 2024

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

3. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
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- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.

10.13. Personal Services

Table 114. Global Crowd Management Software Market Size, by Personal Services, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 115. Global Crowd Management Software Market Size, by Personal Services, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 116. Global Crowd Management Software Market Size, by Personal Services, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual
   - Taxonomy evidence: Repair and personal-service activities have explicit service classifications. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
2. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
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9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

10.14. Industrial and Infrastructure Operators

Table 117. Global Crowd Management Software Market Size, by Industrial and Infrastructure Operators, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 118. Global Crowd Management Software Market Size, by Industrial and Infrastructure Operators, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 119. Global Crowd Management Software Market Size, by Industrial and Infrastructure Operators, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual
   - Taxonomy evidence: Primary production, mining, utilities, construction, and manufacturing have explicit classifications. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.

10.15. Religious and Membership Organizations

Table 120. Global Crowd Management Software Market Size, by Religious and Membership Organizations, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 121. Global Crowd Management Software Market Size, by Religious and Membership Organizations, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 122. Global Crowd Management Software Market Size, by Religious and Membership Organizations, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. 2022 NAICS Manual
   - Taxonomy evidence: Religious and membership organizations have explicit classifications. ([census.gov](https://www.census.gov/naics/reference_files_tools/2022_NAICS_Manual.pdf))
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- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software fee range constrains the common monitoring unit economics; religious-campus channel counts and paid conversion remain assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software fee range constrains the common monitoring unit economics; religious-campus channel counts and paid conversion remain assumptions.
11. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

11. Crowd Management Software Market, by Deployment Model

[redacted] Buyers comparing On-Premises and Hosted arrangements should establish who maintains the application, manages updates, supports interfaces and restores service. Local control is useful only when the buyer or its contractor can fulfill the retained responsibilities; externally managed delivery should be assessed through its actual service commitments.

Connectivity can change the preferred route. [redacted] These are conditional choices, not evidence that either model is generally superior.

Hybrid remains a distinct included arrangement, but an onsite sensor connected to an external application does not by itself establish substantive application execution in both environments. [redacted] Splitting responsibilities can preserve selected local functions, but adds a boundary whose ownership must be explicit.

Figure 16. Global Crowd Management Software Market Size, by Deployment Model, 2025 (%)

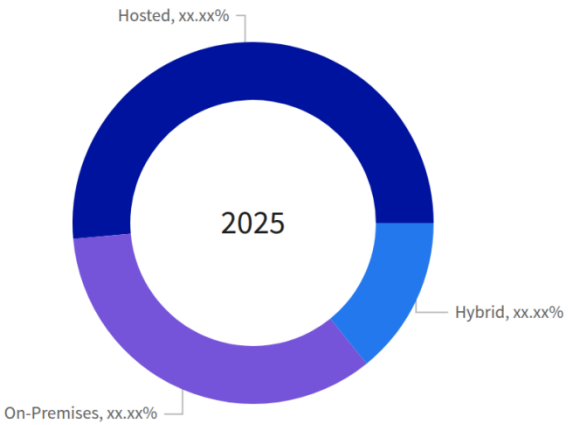

Figure 17. Global Crowd Management Software Market, by Deployment Model, 2032 (USD Million)

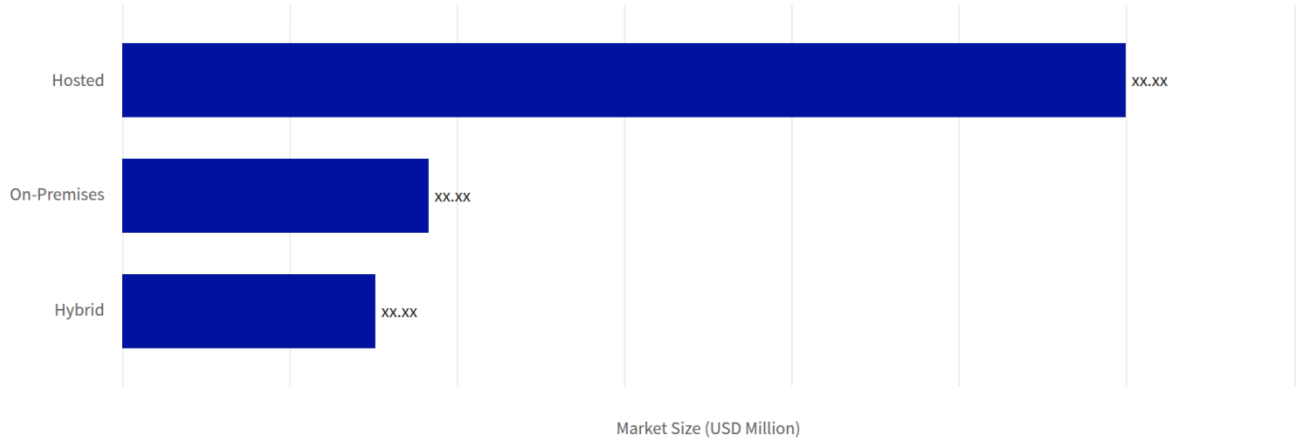

Table 123. Global Crowd Management Software Market, by Deployment Model growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 124. Global Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Qmatic | FAQs

   · Qmatic identifies Experience Cloud as multi-tenant SaaS and Orchestra as an on-premises customer-journey platform. ([qmatic.com](https://www.qmatic.com/resources/faq))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

2. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

   · The account describes local tracking equipment with data sent to cloud servers for analysis and staff alerts, establishing an external application component rather than proving a Hybrid entitlement. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

   · Taxonomy evidence: The government describes a commercial crowd-monitoring system sending data to cloud servers for analysis and staff alerts, establishing externally hosted crowd-application functionality. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

3. Best Cloud-Based Queue Management Software | Qwaiting

   · Qwaiting describes connectivity-dependent cloud queue functions, a local-network alternative for offline requirements and an advertised Hybrid option. The page does not establish a customer's local and external application allocation. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

4. Invitation for Bid - Attleboro Public Schools IP Video Surveillance System

   · Taxonomy evidence: The specification describes analytics capabilities accessible in the cloud or on premises. Alternative capabilities and access wording do not establish simultaneous material application execution in both environments. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))

   · Taxonomy evidence: The municipal specification requests analytics-enabled video software with people counting and describes cloud or on-premises capabilities. It establishes procurement alternatives, not a confirmed hybrid crowd-software deployment. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))

5. The NIST Definition of Cloud Computing

   · Taxonomy evidence: The standard distinguishes cloud service models from cloud deployment models and states that private cloud infrastructure can exist on or off premises. Analytical implication: cloud terminology alone cannot establish whether a crowd application is locally installed or externally hosted. ([nvlpubs.nist.gov](https://nvlpubs.nist.gov/nistpubs/legacy/sp/nistspecialpublication800-xx.xx.pdf))

   · Taxonomy evidence: Its hybrid-cloud definition concerns connected distinct cloud infrastructures; it does not directly verify this taxonomy's broader local-plus-external Hybrid category. ([nvlpubs.nist.gov](https://nvlpubs.nist.gov/nistpubs/legacy/sp/nistspecialpublication800-xx.xx.pdf))

6. Procurement of a Turnkey Solution Comprising E-Ticketing, AI Integratable IP Cameras, Fleet Management System, Safari Animal Webcam, IT Infrastructure and Data Center for Safari Zoo Lahore

   · Taxonomy evidence: The public attraction's turnkey procurement includes queue-management software and analytics requirements with on-premises deployment. It establishes a buyer requirement rather than a completed implementation. ([pwl.gop.pk](https://pwl.gop.pk/wp-content/uploads/2024/xx.xx/PROCUREMENT-OF-TURNKEY-SOLUTION-FOR-SAFARI-ZOO-LAHORE.pdf))

7. Pathfinder Pricing

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

8. End of Life Announcement: Qmatic Show

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

9. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

10. Qwaiting Pricing Plans - Queue Management Software

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

11. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

12. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

13. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

14. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

    · Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

    · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

11.1. Hosted

Table 125. Global Crowd Management Software Market Size, by Hosted, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 126. Global Crowd Management Software Market Size, by Hosted, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 127. Global Crowd Management Software Market Size, by Hosted, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

   · Taxonomy evidence: Cloud-based analysis and alert generation support a hosted analytics component category. The account does not establish that every system function is hosted or isolate software-only consideration. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

2. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
3. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. Qmatic | FAQs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
11. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

12. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

13. Best Cloud-Based Queue Management Software | Qwaiting

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

14. Qwaiting Pricing Plans - Queue Management Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

15. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

16. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

11.2. On-Premises

Table 128. Global Crowd Management Software Market Size, by On-Premises, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 129. Global Crowd Management Software Market Size, by On-Premises, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 130. Global Crowd Management Software Market Size, by On-Premises, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Procurement of a Turnkey Solution Comprising E-Ticketing, AI Integratable IP Cameras, Fleet Management System, Safari Animal Webcam, IT Infrastructure and Data Center for Safari Zoo Lahore

   · Taxonomy evidence: The analytics specifications explicitly identify an on-premises installation option, supporting a locally installed software category. The mixed procurement does not isolate crowd-software revenue.
   ([pwl.gop.pk](https://pwl.gop.pk/wp-content/uploads/2024/xx.xx/PROCUREMENT-OF-TURNKEY-SOLUTION-FOR-SAFARI-ZOO-LAHORE.pdf))

2. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
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4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. Pathfinder Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
11. Qmatic | FAQs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))

12. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
13. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
14. Best Cloud-Based Queue Management Software | Qwaiting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

11.3. Hybrid

Table 131. Global Crowd Management Software Market Size, by Hybrid, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 132. Global Crowd Management Software Market Size, by Hybrid, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 133. Global Crowd Management Software Market Size, by Hybrid, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
2. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

3. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
4. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
5. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

6. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
7. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
8. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
9. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

10. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence.
([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence.
([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

11. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used.
([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

12. Crowd Management Software Market, by License Term

[redacted] Oasys describes standalone and network licensing for MassMotion desktop software; those access arrangements do not, by themselves, identify the duration of rights. Buyers should obtain the governing order rather than classify a license from its installation or access label.

[redacted] Buyers seeking long-horizon access should require explicit provisions covering use after maintenance ends, retained project access and any separately licensed components. Indefinite use rights can preserve continuity while leaving upgrades and support as separate commitments.

Term Licenses require renewal and exit decisions to be aligned with the buyer's operating or project calendar. [redacted] Neither license category eliminates the need to verify the proposed contract's termination and dependency conditions.

Figure 18. Global Crowd Management Software Market Size, by License Term, 2025 (%)

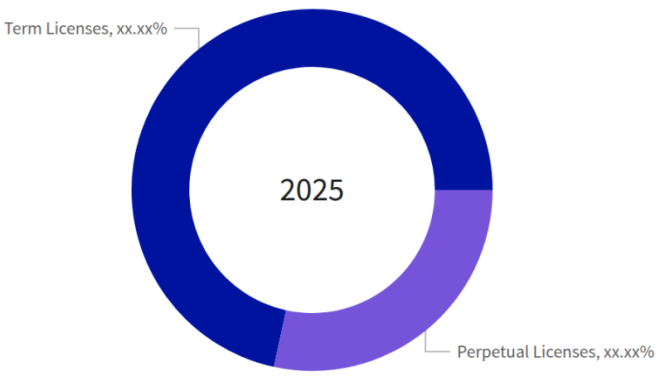

Figure 19. Global Crowd Management Software Market, by License Term, 2032 (USD Million)

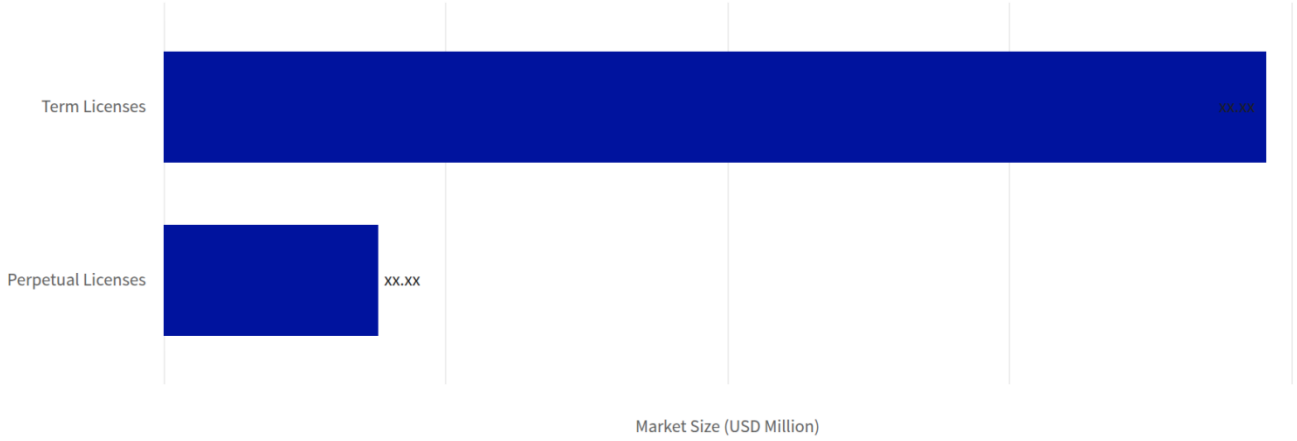

Table 134. Global Crowd Management Software Market, by License Term growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 135. Global Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. LEGION | Bentley Systems
   - The published LEGION offering includes a xx.xx-month subscription, directly establishing a specified-period offering. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))

2. Software Licenses | GSA

   · GSA's purchasing scope distinguishes indefinite-duration perpetual licenses, specified-period term licenses and software maintenance. It establishes a general duration framework, not a particular crowd-software entitlement.
   ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

   · Taxonomy evidence: The purchasing page updated September xx.xx 2026 retains both indefinite-duration and specified-period software licenses and separately describes maintenance products and basic functional support. This refresh supports the duration distinction and software-only boundary, not crowd-specific licensing shares.
   ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

   · Taxonomy evidence: The official software-purchasing classification distinguishes perpetual and term licenses and separately includes maintenance and basic support. This establishes a general software duration framework, not crowd-market adoption or shares.
   ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations.
   ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations.
   ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion.
   ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion.
   ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

3. Oasys Software | Terms and Conditions

   · Oasys distinguishes support and maintenance included with subscriptions from maintenance arrangements for software held under perpetual licenses. This does not establish the rights in a proposed MassMotion order.
   ([oasys-software.com](https://www.oasys-software.com/terms/))

4. Oasys Licence Agreement (Installed on hardware versions)

   · Oasys's linked installed-software agreement permits use during an order-defined license term and includes renewal and termination provisions. It demonstrates expiring rights for installed software, not a customer's perpetual continuation right.
   ([oasys-software.com](https://www.oasys-software.com/wp-content/uploads/2026/xx.xx/Oasys-Software-Licence-and-Support-Agreement-May-2021.pdf))

5. MassMotion | pedestrian simulation and crowd modelling software

   · Oasys markets MassMotion as desktop software with standalone and network licensing options; those access labels do not themselves specify entitlement duration.
   ([oasys-software.com](https://www.oasys-software.com/products/pedestrian-simulation-software/massmotion/))

6. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022

   · Taxonomy evidence: Recurring software-license and maintenance charges are combined. Their recurrence does not establish whether underlying application-use rights are perpetual or expiring. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

   · Taxonomy evidence: Recurring software license and maintenance fees are combined in the request. The underlying application-use expiry is not stated, so recurring expenditure alone cannot establish Term Licenses. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

7. Acquisition letter MV-2024-01: Guidance on payment for software licenses delivered via SaaS

   · Taxonomy evidence: The guidance treats SaaS access duration, pricing units and payment timing as distinguishable contractual attributes. It supports keeping License Term independent of hosting and billing cadence. ([gsa.gov](https://www.gsa.gov/policy-regulations/policy/acquisition-policy/acquisition-policy-library-and-resources/mv202401))

8. accesso Technology Group plc - Annual Report and Accounts 2023

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

9. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

10. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
11. Pricing & Per-Solution ROI Calculators | Zeour Ltd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
12. Smart Retail Counter - People Counting and Queue Analytics Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

13. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

14. Bentley Systems, Incorporated - 2025 Form 10-K

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))

15. Crowd Connected Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))

12.1. Term Licenses

Table 136. Global Crowd Management Software Market Size, by Term Licenses, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 137. Global Crowd Management Software Market Size, by Term Licenses, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 138. Global Crowd Management Software Market Size, by Term Licenses, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Software Licenses

- Taxonomy evidence: Term licensing is expressly distinguished by a specified validity period. Invoice recurrence alone is not the classification criterion supplied by this record. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Taxonomy evidence: Term licenses are identified as licenses valid for a specified period. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

2. Acquisition letter MV-2024-01: Guidance on payment for software licenses delivered via SaaS
   - Taxonomy evidence: The purchasing criteria describe continuous software access over a negotiated fixed term, with seat, unit or subscription pricing. This supports a term-access class without establishing a particular crowd-software agreement. ([gsa.gov](https://www.gsa.gov/policy-regulations/policy/acquisition-policy/acquisition-policy-library-and-resources/mv202401))
3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. LEGION | Bentley Systems
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))

12. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
13. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
14. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
15. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
16. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))

12.2. Perpetual Licenses

Table 139. Global Crowd Management Software Market Size, by Perpetual Licenses, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 140. Global Crowd Management Software Market Size, by Perpetual Licenses, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 141. Global Crowd Management Software Market Size, by Perpetual Licenses, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Software Licenses

· Taxonomy evidence: Perpetual licensing is an expressly identified software-purchasing class. The record does not establish a particular crowd-software agreement or the consequences of maintenance nonrenewal. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

· Taxonomy evidence: Perpetual licenses are identified as indefinite-duration licenses within the software-purchasing scope. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

2. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
3. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

11. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
12. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
13. Pricing & Per-Solution ROI Calculators | Zeour Ltd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
14. Smart Retail Counter - People Counting and Queue Analytics Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
15. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

16. Bentley Systems, Incorporated - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))

13. Crowd Management Software Market, by Sales Channel

Direct Sales and Indirect Sales differ in the contracting relationship, not simply in who presents the product. ■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ Buyers should identify the seller of record in the proposed order before assigning a crowd-software purchase to either channel.

■■■■■■■■ ■■■■■■■■ ■■■ ■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■ ■■■■ ■■■■■■■■■ A different intermediary role appears in WaitTime's description of TD SYNNEX distribution for supporting hardware and services. Hardware distribution should not automatically be classified as resale of the crowd-software entitlement, and neither relationship establishes a customer's complete responsibility allocation.

A buyer with adequate implementation resources can evaluate a publisher-facing route without assuming that it includes local integration or on-site assistance. Where those services are necessary, the intermediary route is preferable only if the partner's mandate, delivery obligations and escalation arrangements are documented. ■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■

Figure 20. Global Crowd Management Software Market Size, by Sales Channel, 2025 (%)

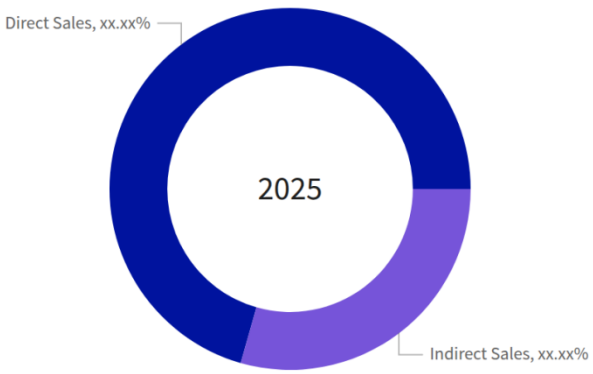

Figure 21. Global Crowd Management Software Market, by Sales Channel, 2032 (USD Million)

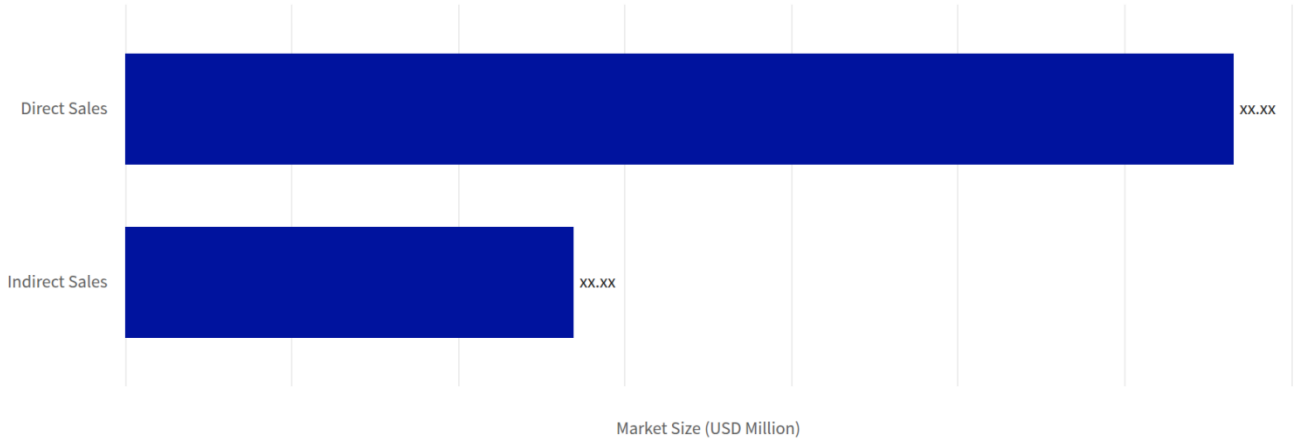

Table 142. Global Crowd Management Software Market, by Sales Channel growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 143. Global Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. LEGION | Bentley Systems

· Bentley provides a LEGION purchase route through its product page. ([bentley.com](https://www.bentley.com/products/legion/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.

2. Partners | WaitTime
   - WaitTime describes TD SYNNEX distribution for supporting hardware and services, which does not independently establish resale of software entitlement. ([thewaittimes.com](https://www.thewaittimes.com/partners))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
3. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   - Qmatic's August xx.xx 2026 announcement assigns Swiss delivery, implementation and support to Corvice AG. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
4. OneGov | GSA
   - OneGov combines direct manufacturer relationships with purchasing access through value-added resellers; it does not establish crowd-software participation. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
   - Taxonomy evidence: The page updated October xx.xx 2026 describes direct manufacturer relationships alongside access through value-added resellers. This confirms that upstream negotiation and the final transaction channel must not be treated as equivalent. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
   - Taxonomy evidence: The software-purchasing program describes manufacturer negotiations alongside purchasing through value-added resellers. Analytical implication: upstream negotiation and the final contracting channel must be distinguished. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

5. accesso Technology Group plc - Results for the six months ended 30 June 2026
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.
6. Bentley Systems, Incorporated - 2025 Form 10-K
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
7. Qminder Terms of Service
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
8. Business Partnership Opportunities for Queue Management - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
9. New York City Record - December 23, 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

10. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
11. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
12. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
13. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
14. Zoho Backstage - Terms of Use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

13.1. Direct Sales

Table 144. Global Crowd Management Software Market Size, by Direct Sales, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 145. Global Crowd Management Software Market Size, by Direct Sales, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 146. Global Crowd Management Software Market Size, by Direct Sales, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OneGov

- Taxonomy evidence: Manufacturer engagement is described but can coexist with reseller purchasing. It therefore does not establish publisher-to-customer seller-of-record status for a crowd-software transaction. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
- Taxonomy evidence: Direct manufacturer relationships are described, but can coexist with reseller transactions; the page does not by itself establish direct publisher-to-customer crowd-software sales. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.

2. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
3. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. LEGION | Bentley Systems
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
11. accesso Technology Group plc - Results for the six months ended 30 June 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

12. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
13. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
14. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
15. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
16. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
17. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.

18. Zoho Backstage - Terms of Use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

13.2. Indirect Sales

Table 147. Global Crowd Management Software Market Size, by Indirect Sales, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 148. Global Crowd Management Software Market Size, by Indirect Sales, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 149. Global Crowd Management Software Market Size, by Indirect Sales, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. OneGov

· Taxonomy evidence: Value-added resellers remain an expressly described software-purchasing path. This supports the intermediary concept without establishing crowd-market participation or revenue allocation for a particular reseller. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))

· Taxonomy evidence: Value-added resellers are expressly recognized as a purchasing path for software agreements. ([gsa.gov](https://www.gsa.gov/buy-through-us/purchasing-programs/multiple-award-schedule/onegov))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

2. Invitation for Bid - Attleboro Public Schools IP Video Surveillance System
   - Taxonomy evidence: The specification assigns work to a successful integrator separately from the manufacturer. This supports intermediary-led procurement relevance, but does not establish an award, qualifying software resale or software-only consideration. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))
   - Taxonomy evidence: The specification distinguishes the manufacturer from a successful integrator supplying the system. This supports an intermediary-led contracting path, while the qualifying crowd-software component and its consideration require separate attribution; no award is established here. ([cityofattleboro.us](https://www.cityofattleboro.us/DocumentCenter/View/xx.xx))
3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. accesso Technology Group plc - Results for the six months ended 30 June 2026
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.
12. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.

13. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
14. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
15. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
16. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
17. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
18. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
19. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.

14. Crowd Management Software Market, by Operating Environment

Indoor, Outdoor, and Indoor and Outdoor classify the physical coverage being purchased, independently of where the application is hosted. ■■■■■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ Buyers should distinguish the spaces represented in a planning assignment from the coverage promised by a live-monitoring service; an indoor planning example does not establish operational monitoring capability.

Outdoor purchasing needs explicit coverage boundaries rather than an assumption that admission records describe the whole site. HSE guidance recognizes that outdoor event boundaries can be less well-defined and identifies weather and site suitability as relevant considerations. ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■ ■■■■■■■ ■■■ ■■■■■ ■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■■■ ■■■■■■ ■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■ ■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■

Indoor and Outdoor coverage can make integration ownership more important than a single product label. ■■■ ■■■■ ■■ ■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ The proposal establishes a purchasing requirement, not completed deployment or one inseparable software entitlement.

Figure 22. Global Crowd Management Software Market Size, by Operating Environment, 2025 (%)

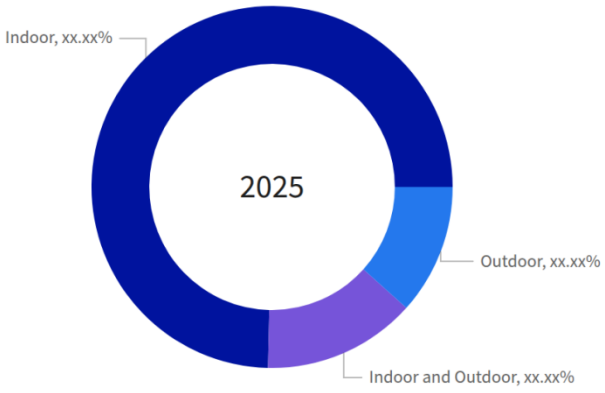

Figure 23. Global Crowd Management Software Market, by Operating Environment, 2032 (USD Million)

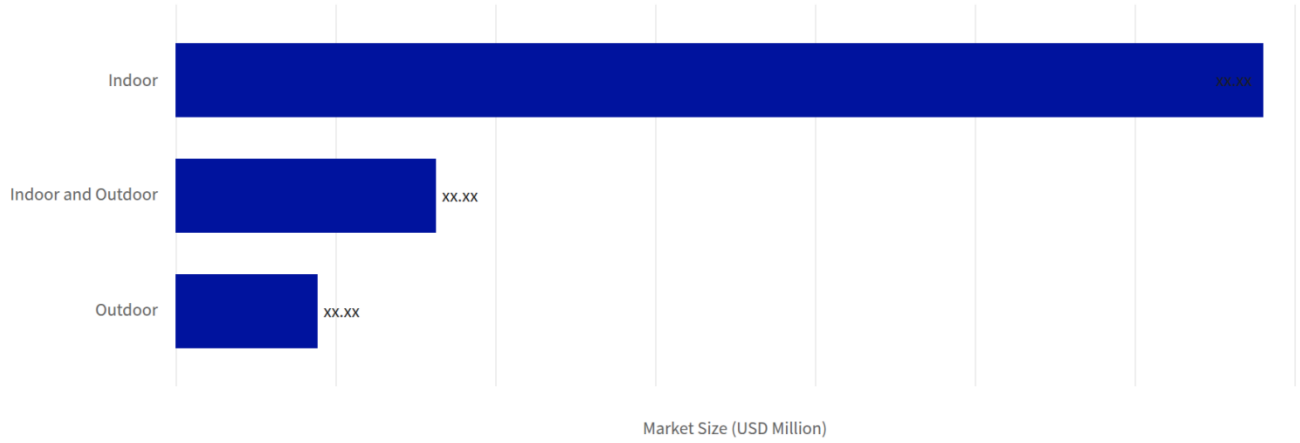

Table 150. Global Crowd Management Software Market, by Operating Environment growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 151. Global Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. LEGION | Bentley Systems

· LEGION's published settings include stations, office complexes, theaters and piazzas; these are planning capabilities, not proof of live monitoring. ([bentley.com](https://www.bentley.com/products/legion/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

2. Assess Crowd Safety Risks and Identify Hazards - HSE

· HSE recognizes less-defined outdoor event boundaries and identifies weather and site suitability as crowd-management considerations. Applying these distinctions to purchased software coverage is commercial interpretation. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

· Taxonomy evidence: Crowd-risk guidance identifies venue and site characteristics as relevant to capacity and movement assessment, separately recognizing urban streets and open spaces. This supports a physical-coverage distinction independent of software hosting. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

3. Passenger Flow Metrics Project - Port of Seattle Commission Agenda Memorandum, April 26, 2022
   - The April 2022 proposal spans roadways and terminal journeys, prefers consolidation of existing and new information sources, and acknowledges less detailed movement information than a broader alternative. It is an authorization request. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Taxonomy evidence: The airport buyer's authorization request combines passenger-flow measurement along roadways and through terminal/concourse areas within one proposed program. This supports the commercial relevance of coverage spanning exterior and interior spaces. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 proposal connects roadway and terminal journeys and budgets USD xx.xx annually in recurring obligations. It supports combined physical coverage as a commercial requirement and the inherited contract-pricing anchor, but not completed deployment or one inseparable license. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 proposal connects roadway and terminal journeys and budgets USD xx.xx annually in recurring obligations. It supports combined physical coverage as a commercial requirement and the inherited contract-pricing anchor, but not completed deployment or one inseparable license. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
4. Standards and Guidance - Life Safety First: Event Safety Alliance
   - Taxonomy evidence: The standards program includes crowd management and expressly includes indoor and outdoor events within its weather-preparedness standard. It establishes recognized event settings, not a software-market partition. ([event-safety-alliance.squarespace.com](https://event-safety-alliance.squarespace.com/standards-guidance-xx.xx))
5. Qmatic Welcomes New CEO and Vice CEO
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
6. Xovis - Swiss precision measures people flows worldwide
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))

7. RetailNext Majority Growth Investment From Battery Ventures

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

8. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

9. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

10. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

14.1. Indoor

Table 152. Global Crowd Management Software Market Size, by Indoor, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 153. Global Crowd Management Software Market Size, by Indoor, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 154. Global Crowd Management Software Market Size, by Indoor, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Standards and Guidance - Life Safety First: Event Safety Alliance
   - Taxonomy evidence: Indoor events are explicitly within the standards program's event-safety scope, providing demand-context support for an indoor software-coverage category. ([event-safety-alliance.squarespace.com](https://event-safety-alliance.squarespace.com/standards-guidance-xx.xx))
2. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

3. World Airport Traffic Forecasts 2024-2053 Executive Summary

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
6. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. LEGION | Bentley Systems
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
11. Qmatic Welcomes New CEO and Vice CEO
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

12. Xovis - Swiss precision measures people flows worldwide

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))

13. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

14. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

15. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

14.2. Indoor and Outdoor

Table 155. Global Crowd Management Software Market Size, by Indoor and Outdoor, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 156. Global Crowd Management Software Market Size, by Indoor and Outdoor, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 157. Global Crowd Management Software Market Size, by Indoor and Outdoor, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Traffic Modelling Guidelines v4

   · Taxonomy evidence: The Parliament Square case connects street-level space with an underpass through Westminster Underground station. This establishes cross-environment modeling relevance, but not one inseparable commercial license or its software value.
   ([content.tfl.gov.uk](https://content.tfl.gov.uk/traffic-modelling-guidelines.pdf))

2. Passenger Flow Metrics Project - Commission Agenda Memorandum, April 26, 2022
   - Taxonomy evidence: The proposed measurement paths span roadways and terminal or concourse areas. This supports combined physical coverage as a buyer requirement, not confirmation of one inseparable licensed module. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Taxonomy evidence: Combined roadway and terminal coverage supports the need for an Indoor and Outdoor category. A finalized inseparable software entitlement, completed deployment and software-only value are not established by this authorization request. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 proposal connects roadway and terminal journeys and budgets USD xx.xx annually in recurring obligations. It supports combined physical coverage as a commercial requirement and the inherited contract-pricing anchor, but not completed deployment or one inseparable license. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 proposal connects roadway and terminal journeys and budgets USD xx.xx annually in recurring obligations. It supports combined physical coverage as a commercial requirement and the inherited contract-pricing anchor, but not completed deployment or one inseparable license. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
3. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

4. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.

5. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
6. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
7. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

8. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
9. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
10. Find A Qmatic Partner
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
11. LEGION | Bentley Systems
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
12. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

13. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

14.3. Outdoor

Table 158. Global Crowd Management Software Market Size, by Outdoor, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 159. Global Crowd Management Software Market Size, by Outdoor, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 160. Global Crowd Management Software Market Size, by Outdoor, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Assess crowd safety risks and identify hazards

· Taxonomy evidence: The guidance specifically addresses outdoor spaces with less-defined event boundaries and zone-based capacity assessment. Applying that demand distinction to software coverage is an analytical adaptation, not a published market segment estimate. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

2. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
3. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
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4. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
5. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
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   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.

7. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
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   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
8. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
9. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
10. LEGION | Bentley Systems
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
11. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

15. Crowd Management Software Market, by Region

Asia-Pacific requires separate assessments of purchasing access and data access. ■■■■■■■■■■ ■■■■■■■■■■ ■ ■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■ ■ ■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ A regional proposal should identify the contracting entity and intended data movements separately; neither example establishes conditions throughout Asia-Pacific.

North American institutional purchases can require operational and technology sponsorship rather than a passenger-facing sales proposition. The Port of Seattle's September 2021 Spot Saver memorandum connected airport systems, Commission authorization and Aviation Operations responsibilities. ■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■ ■■■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■

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European comparisons should separate personal-data-dependent monitoring from planning and other applications. EDPB guidance establishes substantive governance requirements for identifiable video, including impact assessment for large-scale systematic monitoring of publicly accessible areas. ■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■ ■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■

Middle Eastern public-service deployments do not automatically represent accessible third-party software contracts. ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■ ■■■■■■■■■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■ The Saudi example should not be generalized to other Middle Eastern buyers.

African examples distinguish customer use from channel presence. Qmatic documents a Capitec banking case in South Africa and separately lists Meditec as a partner in Egypt. ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪

Figure 24. Global Crowd Management Software Market, by Region: Market share evolution, 2025-2032

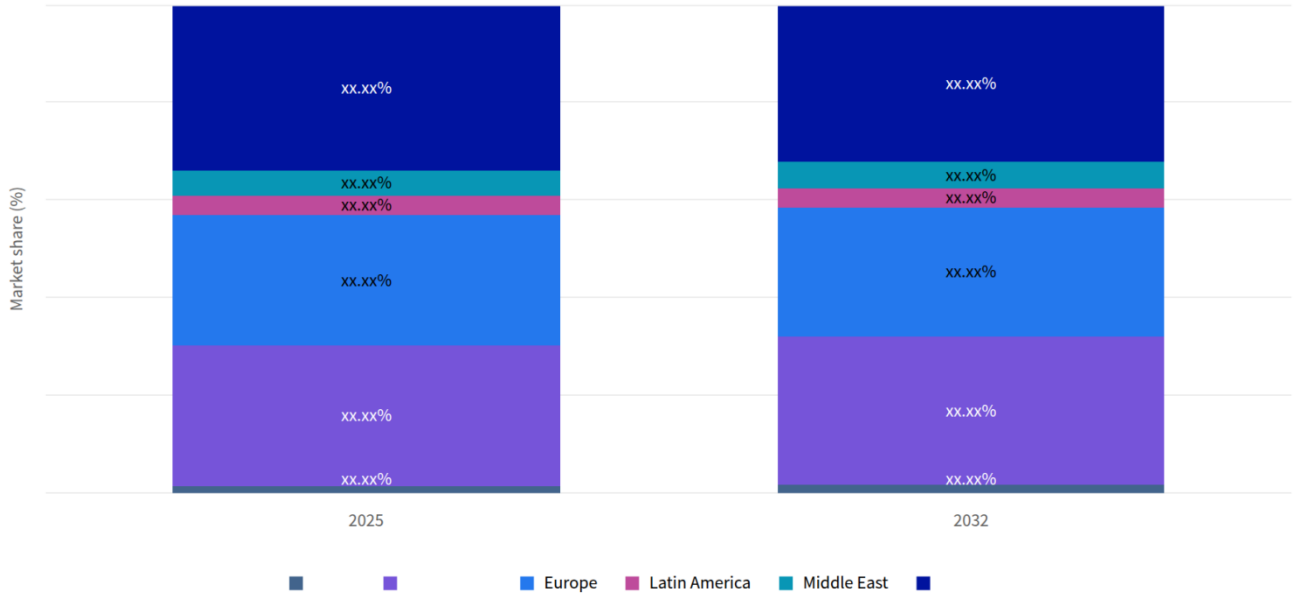

Figure 25. Global Crowd Management Software Market, by Region: Market size by category, 2025

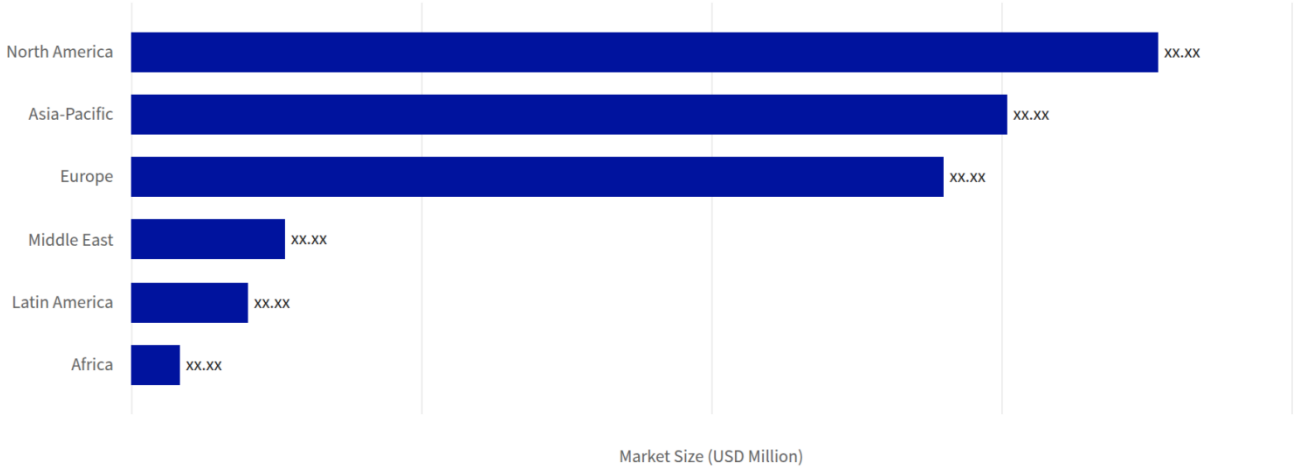

Figure 26. Global Crowd Management Software Market, Regional growth by Sales Channel, 2025-2032 (CAGR %)

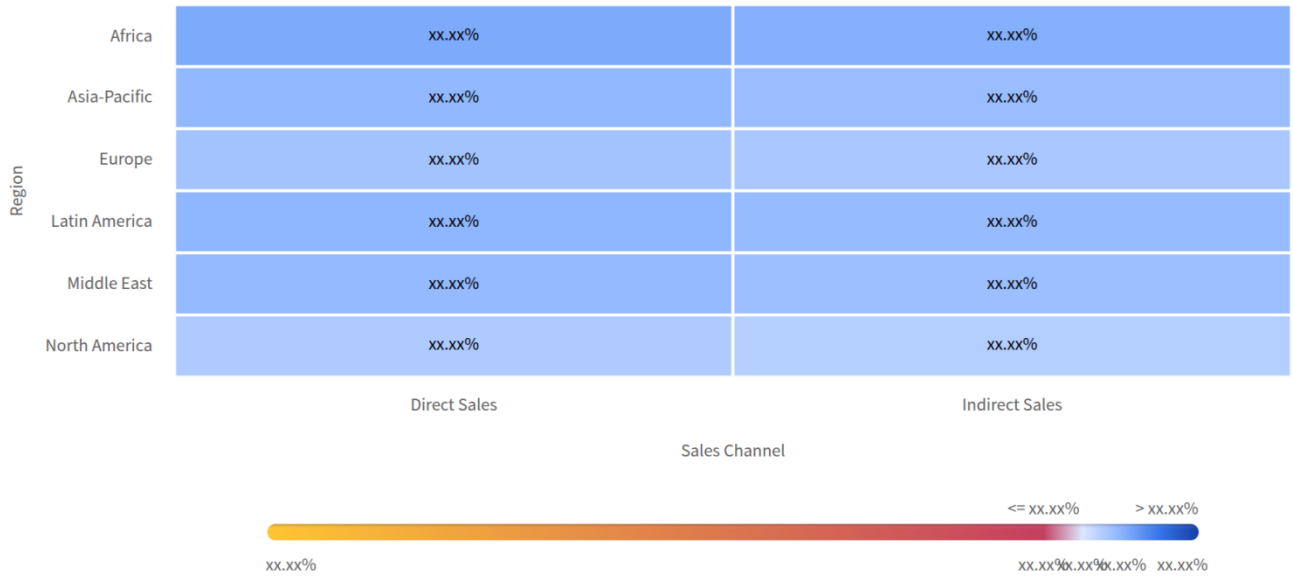

Table 161. Global Crowd Management Software Market, by Region growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 162. Global Crowd Management Software Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Asia-Pacific	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Europe	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latin America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Middle East	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North America	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Port of Seattle Commission Agenda Memorandum: Spot Saver Virtual Queue Program
   · The September 2021 Spot Saver memorandum connects Commission authorization, airport-system integration and Aviation Operations responsibilities, supporting institution-specific buyer sponsorship. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2021/2021_09_28_RM_10c.pdf))
2. Guidelines 3/2019 on Processing of Personal Data Through Video Devices
   · EDPB guidance requires impact assessment for large-scale systematic monitoring of publicly accessible areas and distinguishes information without reference to an identifiable person. ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))
3. Privacy and outsourcing for businesses - Office of the Privacy Commissioner of Canada
   · Organizations subject to PIPEDA retain responsibility for outsourced personal information, including processing abroad. ([priv.gc.ca](https://www.priv.gc.ca/en/privacy-topics/employers-and-employees/outsourcing/02_05_d_57_os_01/?wbdisable=true))
4. Customer stories - Alliar Médicos à Frente
   · Qmatic publishes a customer case for Brazilian healthcare organization Alliar Médicos à Frente; this is a supplier-reported sector example, not regional adoption evidence. ([qmatic.com](https://www.qmatic.com/customer-stories/alliar))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
5. Qmatic Success Story: Capitec Bank
   · Qmatic documents a Capitec Bank customer case in South Africa, establishing a supplier-reported banking use example. ([qmatic.com](https://www.qmatic.com/hubfs/assets/gl/customerstories/Capitec_South%20Africa_reference%20case_public_ENG.pdf))
6. Budget Statement FY2025
   · Saudi Arabia's FY2025 Budget Statement lists crowd-monitoring and analysis services, including Basier and Sawaher, among FY2024 achievements; it does not identify a merchant-software award. ([mof.gov.sa](https://mof.gov.sa/en/budget/2025/Documents/Bud-E%xx.xx-xx.xx-V8-Fin.pdf))
7. GeBIZ | Getting Started
   · GeBIZ provides a registration route for non-ACRA suppliers; registration is distinct from further tender-specific requirements. ([gebiz.gov.sg](https://www.gebiz.gov.sg/cmw/content/getstart.html?current=xx.xx))
8. 促进和规范数据跨境流动规定
   · China's March 2024 cross-border data provisions distinguish regulated information transfers from specified exemptions; they do not establish one rule for every Asia-Pacific deployment. ([cac.gov.cn](https://www.cac.gov.cn/2024-xx.xx/xx.xx/c_1712776611775634.htm))
9. Find A Qmatic Partner
   · Qmatic lists Meditec in Egypt, establishing channel presence rather than a completed customer deployment. ([qmatic.com](https://www.qmatic.com/partner-directory))
   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.

10. The ICT Development Index 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
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    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.

15.1. North America

Table 163. North America Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 164. North America Crowd Management Software Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 165. North America Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 166. North America Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 167. North America Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 168. North America Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 169. North America Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 170. North America Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 171. North America Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 172. North America Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
2. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is added through an explicit modeled boundary bridge.
3. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Half-year receipts of USD xx.xx USA, USD xx.xx Canada and USD xx.xx Mexico constrain a royalty-footprint proxy; broader revenue is not directly counted.

4. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The United States office census is an independent institutional-scale check for the regional purchasing-budget proxy.
5. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: More than xx.xx reported systems across more than xx.xx countries constrain global commercial scale; no destination shares are disclosed.

6. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

7. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

8. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

9. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

10. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

11. People Counting System Pricing - Nano AI + BoostBI | V-Count

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

12. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

13. 5 easy packages to buy Halo for venues
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
14. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

15. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

16. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

17. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
18. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
19. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

20. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
21. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
22. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
23. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
24. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
25. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

26. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
27. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
28. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
29. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

30. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
31. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
32. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
33. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
34. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

35. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
36. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
37. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
38. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

39. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
40. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

41. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

42. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

43. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
44. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
45. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
46. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

47. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
48. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
49. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
50. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
51. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
52. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
53. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

54. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

55. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

56. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

57. Best Cloud-Based Queue Management Software | Qwaiting

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

58. Qwaiting Pricing Plans - Queue Management Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

59. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

60. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

61. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

62. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

63. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

64. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
65. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
66. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

67. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

68. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

69. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

70. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
71. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
72. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

73. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

74. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

75. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

76. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

77. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
78. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
79. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
80. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
81. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

82. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

83. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

84. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

85. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

86. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

87. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

15.2. Asia-Pacific

Table 173. Asia-Pacific Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 174. Asia-Pacific Crowd Management Software Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Taiwan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 175. Asia-Pacific Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 176. Asia-Pacific Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 177. Asia-Pacific Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 178. Asia-Pacific Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 179. Asia-Pacific Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 180. Asia-Pacific Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 181. Asia-Pacific Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 182. Asia-Pacific Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country and peer connectivity inputs calibrate the modeled repeatable-license pool.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Taiwanese score is an explicit assumption.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Taiwanese score is an explicit assumption.

2. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison support the transport scenario, not paid conversion.
3. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Combined Asia/Australia/South Pacific/Africa receipts total USD xx.xx; the xx.xx% Asia-Pacific bridge is assumed.
4. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global footprint supports regional participation but does not establish paying Asia-Pacific installations.

5. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

6. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

7. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

8. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

9. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

10. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

11. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

12. 5 easy packages to buy Halo for venues

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

13. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

14. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

15. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

16. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
17. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
18. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

19. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
20. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
21. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
22. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
23. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
24. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

25. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
26. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
27. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
28. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

29. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
30. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
31. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
32. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
33. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

34. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
35. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
36. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
37. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

38. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
39. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

40. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
41. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

42. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
43. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
44. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
45. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

46. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
47. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
48. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
49. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
50. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
51. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
52. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

53. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

54. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

55. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

56. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

57. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

58. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

59. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

60. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

61. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

62. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

63. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

64. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

65. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

66. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

67. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

68. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

69. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
70. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
71. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

72. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

73. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

74. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

75. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

76. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
77. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
78. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
79. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
80. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

81. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

82. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

83. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

84. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

85. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

86. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

15.3. Europe

Table 183. Europe Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 184. Europe Crowd Management Software Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Switzerland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 185. Europe Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 186. Europe Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 187. Europe Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 188. Europe Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 189. Europe Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 190. Europe Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 191. Europe Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 192. Europe Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
2. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers; Turkey is reclassified through a modeled bridge.
3. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UK USD xx.xx and other Europe USD xx.xx are broader half-year portfolio receipts, requiring a scope bridge.

4. EU structural financial indicators: end of 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The EU had xx.xx bank offices at end-2024; the xx.xx% average decline challenges a footprint-expansion-only interpretation of software growth.
5. Who we are - Qmatic
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported global installed-system footprint supports a multi-region institutional market, not an observed European revenue share.
6. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Swiss partner entry establishes a channel role, not customer-specific recurring revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Swiss partner entry establishes a channel role, not customer-specific recurring revenue.

7. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

8. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

9. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

10. Qmatic | FAQs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

11. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

12. People Counting System Pricing - Nano AI + BoostBI | V-Count
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

13. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

14. 5 easy packages to buy Halo for venues
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
15. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

16. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

17. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

18. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
19. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
20. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

21. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
22. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
23. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
24. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
25. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
26. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

27. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
28. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
29. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
30. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

31. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
32. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
33. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
34. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
35. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

36. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
37. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
38. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
39. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

40. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
41. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

42. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
43. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

44. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
45. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
46. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
47. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

48. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
49. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
50. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
51. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
52. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
53. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
54. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

55. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

56. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

57. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

58. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

59. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

60. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

61. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

62. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

63. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

64. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

65. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
66. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
67. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

68. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

69. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

70. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

71. Bentley Systems, Incorporated - 2025 Form 10-K

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.

72. Crowd Connected Pricing

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))

73. Qminder Terms of Service

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

74. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

75. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

76. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

77. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

78. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
79. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
80. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
81. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
82. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

83. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

84. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

85. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

86. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

87. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
88. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

15.4. Middle East

Table 193. Middle East Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 194. Middle East Crowd Management Software Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Israel	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 195. Middle East Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 196. Middle East Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 197. Middle East Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 198. Middle East Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 199. Middle East Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 200. Middle East Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 201. Middle East Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 202. Middle East Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
2. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers and a xx.xx% medium-term growth comparison; Turkey is added through a modeled bridge.
3. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx Middle Eastern receipts constrain a modeled footprint, not pure crowd-software sales.

4. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Gulf country entries support possible commercial routes without measuring purchasing conversion.
5. Pathfinder Pricing
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

6. LEGION | Bentley Systems
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

7. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

8. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

9. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts.
([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts.
([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

10. People Counting System Pricing - Nano AI + BoostBI | V-Count

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

11. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

12. 5 easy packages to buy Halo for venues
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
13. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

14. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

15. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

16. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
17. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
18. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

19. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
20. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
21. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
22. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
23. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
24. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

25. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
26. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
27. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
28. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

29. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
30. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
31. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
32. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
33. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

34. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
35. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
36. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
37. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

38. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
39. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

40. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
41. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

42. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
43. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
44. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
45. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

46. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
47. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
48. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
49. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
50. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
51. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
52. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

53. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

54. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

55. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

56. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

57. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

58. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

59. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

60. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

61. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

62. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

63. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

64. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

65. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

66. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

67. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

68. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

69. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
70. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
71. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

72. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

73. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

74. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

75. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

76. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
77. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
78. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
79. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
80. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

81. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

82. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

83. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

84. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

85. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

86. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

15.5. Latin America

Table 203. Latin America Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 204. Latin America Crowd Management Software Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Argentina	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Chile	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Colombia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Peru	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 205. Latin America Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 206. Latin America Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 207. Latin America Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 208. Latin America Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 209. Latin America Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 210. Latin America Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 211. Latin America Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 212. Latin America Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
2. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers in the source classification; Mexico is removed through an explicit modeled boundary bridge.
3. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx other Central/South American receipts are a supplier footprint input, not the regional market.

4. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The customer example independently supports healthcare scope, not uniform regional adoption.
5. Pathfinder Pricing
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

6. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

7. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

8. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

9. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

10. People Counting System Pricing - Nano AI + BoostBI | V-Count

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

11. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

12. 5 easy packages to buy Halo for venues

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

13. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

14. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

15. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

16. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
17. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
18. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

19. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
20. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
21. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
22. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
23. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
24. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

25. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
26. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
27. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
28. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

29. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
30. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
31. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
32. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
33. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

34. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
35. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
36. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
37. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

38. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
39. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

40. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
41. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

42. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
43. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
44. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
45. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

46. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
47. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
48. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
49. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
50. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
51. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
52. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

53. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

54. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

55. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

56. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

57. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

58. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

59. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

60. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

61. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

62. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

63. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

64. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

65. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

66. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

67. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

68. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

69. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
70. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
71. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

72. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

73. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

74. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

75. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

76. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
77. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
78. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
79. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
80. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

81. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

82. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

83. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

84. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

85. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

86. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

15.6. Africa

Table 213. Africa Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 214. Africa Crowd Management Software Market Size, by Region, 2017-2040 (USD Million)

Region	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Egypt	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kenya	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Nigeria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 215. Africa Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 216. Africa Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 217. Africa Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 218. Africa Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 219. Africa Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 220. Africa Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 221. Africa Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 222. Africa Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Country connectivity inputs calibrate the modeled repeatable-license pool; paid conversion is assumed.
2. World Airport Traffic Forecasts 2024-2053 Executive Summary
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Approximately xx.xx 2024 passengers constrain the transport footprint, not software receipts.
3. accesso Technology Group plc - Half Year Results 2025
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Africa is combined with Asian/Pacific receipts; the xx.xx% allocation is assumed.
4. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Egyptian partner entries are a route-to-market check, not an installed customer base.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Egyptian partner entries are a route-to-market check, not an installed customer base.

5. Pathfinder Pricing

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

6. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

7. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

8. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

9. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

10. People Counting System Pricing - Nano AI + BoostBI | V-Count

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

11. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

12. 5 easy packages to buy Halo for venues
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
13. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

14. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

15. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

16. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
17. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
18. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

19. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
20. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
21. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
22. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
23. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
24. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

25. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
26. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
27. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
28. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

29. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
30. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
31. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
32. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
33. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

34. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
35. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
36. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
37. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

38. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
39. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

40. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
41. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

42. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
43. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
44. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
45. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

46. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
47. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
48. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
49. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
50. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
51. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
52. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

53. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

54. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

55. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

56. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

57. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

58. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

59. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

60. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

61. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

62. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

63. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
64. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
65. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

66. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

67. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

68. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

69. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
70. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
71. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

72. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

73. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

74. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

75. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

76. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
77. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
78. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
79. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
80. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

81. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

82. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

83. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

84. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

85. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

86. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

16. Crowd Management Software Market, by Group

[illegible] A multi-country crowd-software buyer can standardize questions about visitor-data use and accountability, but should retain country-specific contractual checks. Shared principles can simplify the questionnaire; they do not establish identical processing permissions or public purchasing access.

Europe, Middle East & Africa should be managed as a coordinated contract portfolio, not assumed to provide one compliance or procurement clearance. [illegible] A regional delivery arrangement is useful only when its territorial responsibilities are documented.

ASEAN provides a practical contracting aid for cross-border personal-data relationships. [illegible] Standardized clauses can reduce repeated drafting, while a local arrangement may be preferable when the buyer cannot establish the proposed cross-border relationship.

[illegible] A crowd-software bidder should first establish the actual purchasing body's rules before choosing direct participation or an intermediary. A regional affiliation alone does not settle eligibility.

Australasia has a more concrete procurement-access mechanism between Australia and New Zealand. [illegible] Direct bidding still depends on capability

and the particular procurement; local delivery assistance remains a separate service choice, not an automatic legal prerequisite.

Nordic buyers have evidence of cross-border channel coverage without a uniform regional service contract. Qmatic lists Renovotec for Sweden, Norway and Denmark, alongside separate partners in Finland and Iceland. ▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪

European Union buyers of covered Hosted services have an additional exit-contract consideration. The Data Act's switching provisions address contractual transparency, open interfaces and export of customer-generated information for covered software services. ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪

BRICS cooperation is a policy and infrastructure context rather than a common crowd-software entitlement. The 2025 leaders' declaration encourages digital-public-infrastructure cooperation while recognizing national legislative frameworks. ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪

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Standardize the commercial questions where useful, then verify the actual transfer mechanism and service contract. Policy convergence can inform supplier evaluation without eliminating jurisdiction-specific commitments.

NATO institutional procurement is a distinct buyer route, not a proxy for civilian crowd-software demand across member countries. ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪

These geographic groups overlap and are non-additive analytical views, not separate markets to combine.

Figure 27. Global Crowd Management Software Market Size, by Group, 2025 vs 2026 vs 2032

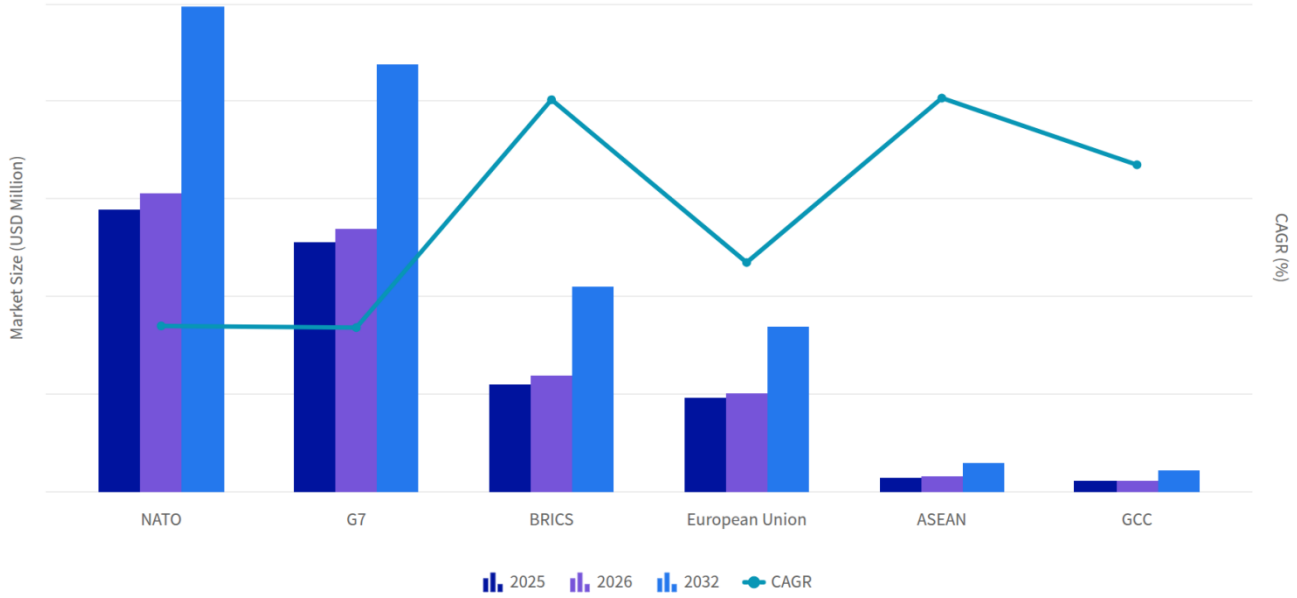

Table 223. Global Crowd Management Software Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
ASEAN	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
BRICS	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
European Union	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
G7	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
GCC	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
NATO	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Sources & Evidence

1. Guidelines 3/2019 on Processing of Personal Data Through Video Devices
   · The guidance establishes personal-video-processing requirements, not procurement eligibility for unrelated EMEA institutions.
   ([edpb.europa.eu](https://www.edpb.europa.eu/sites/default/files/files/file1/edpb_guidelines_201903_video_devices_en_0.pdf))
2. Data Act explained
   · For covered data-processing services, the Data Act addresses contract transparency, open interfaces and customer-generated data export, with provider intellectual-property and trade-secret exclusions.
   ([digital-strategy.ec.europa.eu](https://digital-strategy.ec.europa.eu/en/factpages/data-act-explained))
3. Privacy and outsourcing for businesses - Office of the Privacy Commissioner of Canada
   · Canadian outsourcing guidance illustrates a national accountability condition rather than a uniform Americas authorization.
   ([priv.gc.ca](https://www.priv.gc.ca/en/privacy-topics/employers-and-employees/outsourcing/02_05_d_57_os_01/?wbdisable=true))

4. Find A Qmatic Partner
   · Qmatic lists Renovotec for Sweden, Norway and Denmark, with separate partners in Finland and Iceland; the directory does not establish uniform service terms. ([qmatic.com](https://www.qmatic.com/partner-directory))
5. Personal Data Protection
   · The OAS identifies its updated privacy principles as soft law intended to guide and strengthen national frameworks. ([oas.org](https://www.oas.org/ext/en/democracy/personal-data-protection))
6. ASEAN Model Contractual Clauses for Cross Border Data Flows
   · ASEAN's clauses are voluntary templates covering controller-to-processor and controller-to-controller relationships, with national-law requirements and other transfer mechanisms recognized. ([asean.org](https://asean.org/wp-content/uploads/xx.xx-ASEAN-Model-Contractual-Clauses-for-Cross-Border-Data-Flows_Final.pdf))
7. Procedural Rules for Tenders in the General Secretariat of the Gulf Cooperation Council (GCC) - October 2018
   · The GCC Secretariat's rules distinguish local and international tenders, impose registration conditions and recognize applicable GCC treatment. Their scope is Secretariat procurement, not every member-country buyer. ([gcc-sg.org](https://www.gcc-sg.org/en/GeneralSecretariat/Tenders/Rules/Pages/default.aspx))
8. Do you need to include economic benefits in your contract? | New Zealand Government Procurement
   · New Zealand guidance states that the Australia New Zealand Government Procurement Agreement gives both countries' suppliers equal opportunity and treatment, including in applying the stated below-threshold rule. ([procurement.govt.nz](https://www.procurement.govt.nz/guides/rule-xx.xx-guidance-handbook/economic-benefits-essentials/do-you-need-to-include-economic-benefits-in-your-contract/))
9. Rio de Janeiro Declaration: Strengthening Global South Cooperation for a More Inclusive and Sustainable Governance
   · The 2025 BRICS declaration encourages digital-public-infrastructure cooperation while recognizing national legislative frameworks; it does not establish a crowd-software procurement. ([ndb.int](https://www.ndb.int/wp-content/uploads/2025/xx.xx/xx.xx-BRICS-Leaders-Declaration-EN.pdf))
10. Data free flow with trust | OECD
    · OECD describes G7-supported Data Free Flow with Trust cooperation concerning privacy, security and intellectual property, including institutional work to operationalize that policy direction. ([oecd.org](https://www.oecd.org/en/about/programmes/data-free-flow-with-trust.html))
11. Procurement Opportunities
    · NATO states that eligibility is specified by each procurement call and opportunities are generally reserved for firms registered in member nations, with exceptions possible. ([nato.int](https://www.nato.int/en/work-with-us/business-and-project-opportunities/procurement-opportunities))

16.1. NATO

Table 224. NATO Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 224 - continued

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 225. NATO Crowd Management Software Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Albania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Iceland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Montenegro	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
North Macedonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Norway	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Turkey	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 226. NATO Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 227. NATO Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 228. NATO Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 229. NATO Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 230. NATO Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 231. NATO Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 232. NATO Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 233. NATO Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.

2. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

3. LEGION | Bentley Systems
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

4. Qmatic Welcomes New CEO and Vice CEO
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

5. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

6. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

7. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

8. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

9. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
10. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

11. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

12. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

13. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
14. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
15. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

16. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
17. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
18. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
19. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
20. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
21. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

22. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
23. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
24. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
25. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

26. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
27. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
28. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
29. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
30. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

31. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
32. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
33. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
34. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

35. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
36. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

37. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

38. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

39. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
40. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
41. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
42. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

43. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
44. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
45. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
46. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
47. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
48. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
49. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

50. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

51. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

52. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

53. Best Cloud-Based Queue Management Software | Qwaiting

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

54. Qwaiting Pricing Plans - Queue Management Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

55. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

56. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

57. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

58. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

59. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

60. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
61. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
62. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

63. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

64. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

65. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

66. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
67. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
68. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

69. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
70. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
71. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
72. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

73. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
74. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
75. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
76. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
77. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

78. Zoho Backstage - Terms of Use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
79. RetailNext Majority Growth Investment From Battery Ventures
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
80. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
81. Assess crowd safety risks and identify hazards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

82. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
83. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

16.2. G7

Table 234. G7 Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 235. G7 Crowd Management Software Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 236. G7 Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 237. G7 Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 238. G7 Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 239. G7 Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 240. G7 Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 241. G7 Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 242. G7 Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 243. G7 Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.

2. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

3. LEGION | Bentley Systems
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

4. Qmatic Welcomes New CEO and Vice CEO
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

5. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

6. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

7. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

8. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

9. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
10. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

11. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

12. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

13. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
14. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
15. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

16. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
17. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
18. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
19. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
20. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
21. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

22. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
23. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
24. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
25. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

26. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
27. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
28. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
29. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
30. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

31. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
32. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
33. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
34. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

35. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
36. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

37. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
38. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

39. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
40. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
41. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
42. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

43. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
44. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
45. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
46. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
47. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
48. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
49. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

50. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

51. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

52. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

53. Best Cloud-Based Queue Management Software | Qwaiting

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

54. Qwaiting Pricing Plans - Queue Management Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

55. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

56. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

57. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

58. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

59. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

60. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

61. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

62. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

63. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

64. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

65. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

66. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
67. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
68. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

69. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
70. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
71. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
72. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

73. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
74. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
75. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
76. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
77. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

78. Zoho Backstage - Terms of Use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
79. RetailNext Majority Growth Investment From Battery Ventures
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
80. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
81. Assess crowd safety risks and identify hazards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

82. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

83. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

16.3. BRICS

Table 244. BRICS Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 245. BRICS Crowd Management Software Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Africa	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 246. BRICS Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 247. BRICS Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 248. BRICS Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 249. BRICS Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 250. BRICS Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 251. BRICS Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 252. BRICS Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 253. BRICS Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
2. Customer stories - Alliar Médicos à Frente
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.

3. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

4. LEGION | Bentley Systems
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

5. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

6. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

7. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts.
([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts.
([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

8. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

9. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

10. 5 easy packages to buy Halo for venues
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
11. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

12. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

13. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

14. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
15. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
16. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

17. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
18. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
19. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
20. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
21. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
22. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

23. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
24. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
25. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
26. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

27. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
28. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
29. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
30. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
31. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

32. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
33. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
34. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
35. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

36. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
37. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

38. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
39. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

40. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
41. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
42. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
43. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

44. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
45. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
46. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
47. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
48. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
49. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
50. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

51. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

52. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

53. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

54. Best Cloud-Based Queue Management Software | Qwaiting

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

55. Qwaiting Pricing Plans - Queue Management Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

56. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

57. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

58. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

59. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

60. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

61. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

62. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

63. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

64. Pricing & Per-Solution ROI Calculators | Zeour Ltd

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

65. Smart Retail Counter - People Counting and Queue Analytics Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

66. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

67. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
68. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
69. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

70. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

71. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

72. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

73. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

74. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
75. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
76. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
77. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
78. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

79. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

80. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

81. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

82. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

83. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

84. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

16.4. European Union

Table 254. European Union Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 255. European Union Crowd Management Software Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Austria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Belgium	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Bulgaria	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Croatia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cyprus	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Czech Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Denmark	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Estonia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Greece	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hungary	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Ireland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Latvia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lithuania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Luxembourg	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malta	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Netherlands	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Poland	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Portugal	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Romania	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovakia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Slovenia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sweden	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 256. European Union Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 257. European Union Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 258. European Union Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 259. European Union Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 260. European Union Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 261. European Union Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 262. European Union Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 263. European Union Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts.
([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts.
([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
37. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

16.5. ASEAN

Table 264. ASEAN Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 265. ASEAN Crowd Management Software Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brunei	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Cambodia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indonesia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Lao People's Democratic Republic	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Malaysia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Myanmar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Philippines	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Singapore	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Thailand	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Vietnam	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 266. ASEAN Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 267. ASEAN Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 268. ASEAN Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 269. ASEAN Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 270. ASEAN Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 271. ASEAN Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 272. ASEAN Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 273. ASEAN Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Find A Qmatic Partner
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The Brunei partner entry establishes a commercial route, not a deployment count or sales observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The Brunei partner entry establishes a commercial route, not a deployment count or sales observation.

2. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

3. LEGION | Bentley Systems
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

4. Qmatic Welcomes New CEO and Vice CEO
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

5. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

6. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

7. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

8. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

9. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
10. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

11. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

12. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

13. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
14. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
15. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

16. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
17. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
18. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
19. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
20. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
21. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

22. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
23. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
24. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
25. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

26. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
27. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
28. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
29. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
30. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

31. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
32. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
33. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
34. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

35. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
36. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

37. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
38. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

39. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
40. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
41. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
42. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

43. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
44. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
45. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
46. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
47. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
48. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
49. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

50. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

51. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

52. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

53. Best Cloud-Based Queue Management Software | Qwaiting

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

54. Qwaiting Pricing Plans - Queue Management Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

55. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

56. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

57. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

58. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

59. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

60. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

61. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

62. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

63. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

64. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

65. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

66. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
67. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
68. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

69. Business Partnership Opportunities for Queue Management - Qmatic

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.

70. New York City Record - December 23, 2024

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.

71. Channel Partner Program | RetailNext

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.

72. Become a partner | Xovis

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

73. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
74. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
75. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
76. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
77. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

78. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

79. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

80. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

81. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

82. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

83. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

16.6. GCC

Table 274. GCC Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 275. GCC Crowd Management Software Market Size, by Group, 2017-2040 (USD Million)

Group	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Bahrain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Kuwait	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Oman	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Qatar	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Saudi Arabia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Arab Emirates	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx

Table 276. GCC Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 277. GCC Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 278. GCC Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 279. GCC Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 280. GCC Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 281. GCC Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 282. GCC Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 283. GCC Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
37. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
61. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17. Crowd Management Software Market, by Country

In the United States, public-facing queue, reservation and visitor applications supplied to state or local governments need an accessibility commitment that follows the contracted interface. ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■ ■■■■ ■■■■■■■ ■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■ ■■ ■■■■■ ■■■■■■ ■■■ ■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ Suppliers should establish the buyer's classification and application scope before contracting; a private-venue reference does not establish suitability for this public-sector requirement.

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■■■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■ ■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■ ■■ ■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■■■ Crowd-software suppliers should examine the actual tender before selecting a reseller solely for eligibility. Direct participation may be an option, but portal registration does not establish qualification, a local operating right or responsibility for implementation.

Switzerland has a dated local-service route: Qmatic announced Corvice AG in August 2026 to deliver, implement and support its solutions. Buyers can evaluate that route against publisher engagement, but should obtain the proposed contracting and escalation commitments. ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■ ■■■■■ ■■■ ■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■

Figure 28. Global Crowd Management Software Market Size, by Country, 2025 vs 2032 (%)

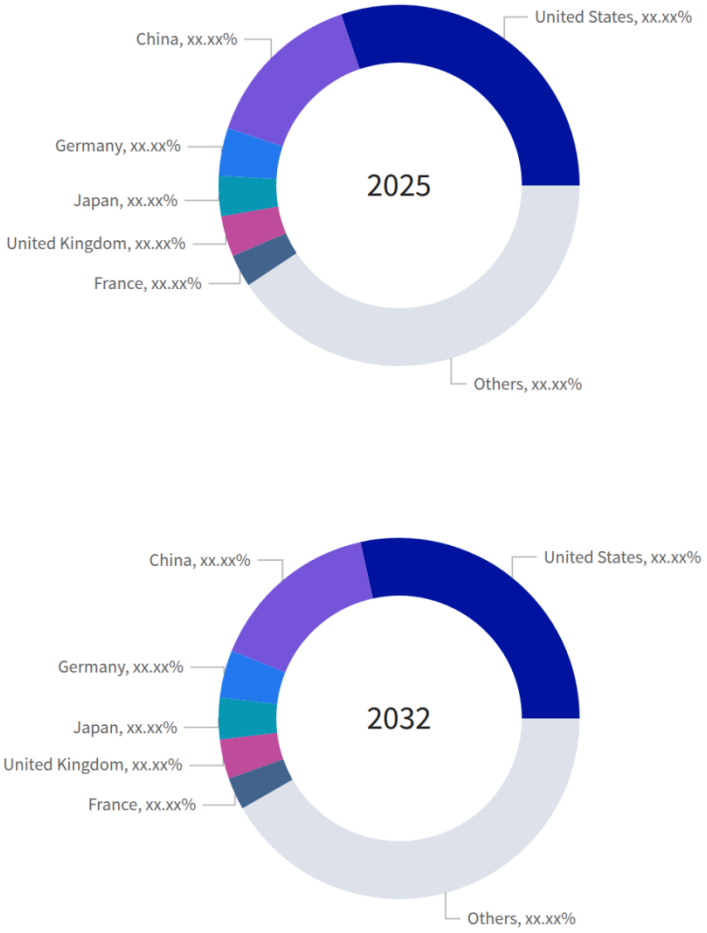

Figure 29. Global Crowd Management Software Market Size, by Country, 2025 vs 2026 vs 2032

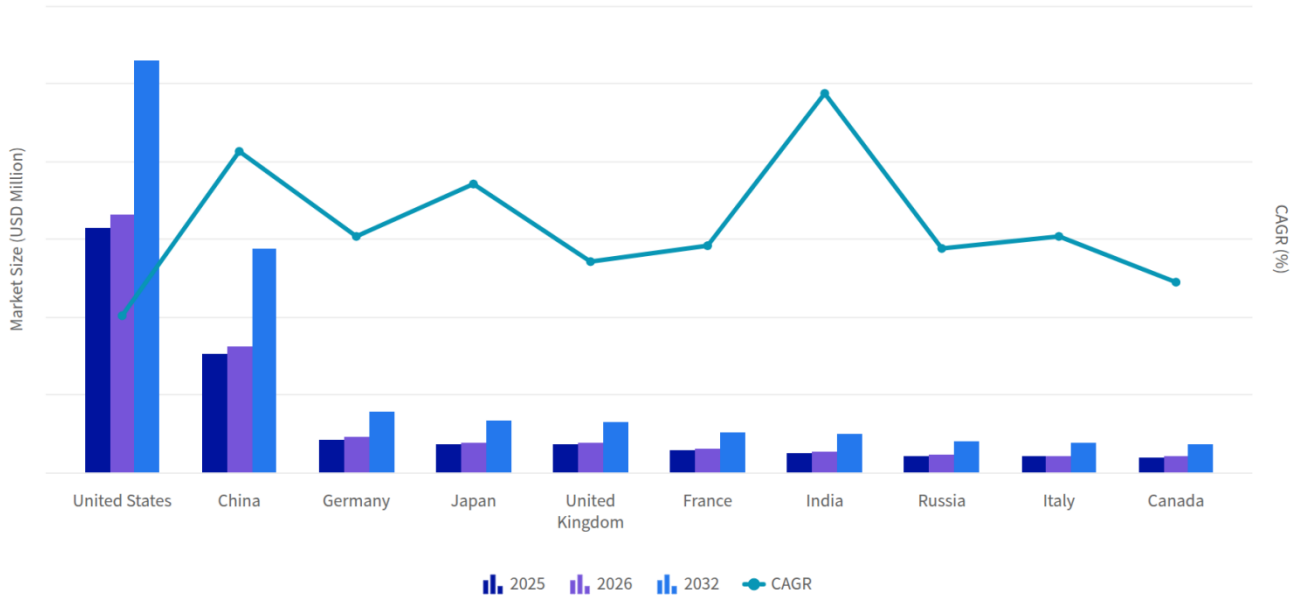

Table 284. Global Crowd Management Software Market, by Country growth contribution, 2025-2032

Category	2025 value (USD Million)	2032 value (USD Million)	Added value (USD Million)	2025 share (%)	2032 share (%)	Change (pp)	Growth share (%)	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Unallocated / remaining scope	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scope total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 285. Global Crowd Management Software Market Size, by Country, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Brazil	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Canada	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
China	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
France	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Germany	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
India	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Italy	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Japan	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mexico	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Russia	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
South Korea	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Spain	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United Kingdom	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
United States	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Others	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   · The announcement establishes Corvice's Swiss partner role, not a customer-specific implementation contract.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))
2. Understanding Martyn's Law and the SIA's Role as Regulator
   · SIA guidance anticipates spring 2027 commencement with the exact date unconfirmed, retains organizational responsibility, and states that government does not endorse particular compliance suppliers.
   ([gov.uk](https://www.gov.uk/guidance/understanding-martyns-law-and-the-sias-role-as-regulator))
3. Fact Sheet: New Rule on the Accessibility of Web Content and Mobile Apps Provided by State and Local Governments
   · DOJ generally requires WCAG xx.xx Level AA for covered state and local-government interfaces, including relevant vendor provision. Compliance dates are April xx.xx 2027 for populations of at least xx.xx and April xx.xx 2028 for smaller entities and special district governments. ([ada.gov](https://www.ada.gov/resources/2024-xx.xx-xx.xx-web-rule/))
4. GeBIZ | Getting Started
   · The non-ACRA registration route supports evaluating direct participation without assuming that every supplier needs a local reseller.
   ([gebiz.gov.sg](https://www.gebiz.gov.sg/cmw/content/getstart.html?current=xx.xx))

5. GeBIZ | FAQ
   - GeBIZ explains that Government Supplier Registration and associated financial assessment apply when required by the tender documents. ([gebiz.gov.sg](https://www.gebiz.gov.sg/faq.html))
6. 《促进和规范数据跨境流动规定》答记者问
   - CAC's March 2024 explanation describes controls concerning personal information and important data, exemptions, and a narrowed assessment scope. ([cac.gov.cn](https://www.cac.gov.cn/2024-xx.xx/xx.xx/c_1712776611649184.htm))
7. Transferência Internacional de Dados
   - ANPD identifies the European Union as adequate under Resolution xx.xx/2026 and explains that recognized adequate destinations do not require an additional international-transfer mechanism for covered transfers; LGPD responsibilities continue. ([gov.br](https://www.gov.br/anpd/pt-br/assuntos/assuntos-internacionais/transferencia-internacional-de-dados))
8. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
9. FDIC Releases Results of Summary of Deposits Annual Survey
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.
10. Customer stories - Alliar Médicos à Frente
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.

17.1. United States

Table 286. United States Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United States	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 287. United States Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 288. United States Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 289. United States Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 290. United States Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 291. United States Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 292. United States Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 293. United States Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 294. United States Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. FDIC Releases Results of Summary of Deposits Annual Survey

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The June 2025 survey covers more than xx.xx domestic offices, constraining the scale of the institutional buyer footprint but not paid software adoption.

2. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

3. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

4. Qmatic Welcomes New CEO and Vice CEO
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

5. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

6. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

7. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

8. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

9. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
10. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

11. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

12. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

13. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
14. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
15. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

16. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
17. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
18. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
19. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
20. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
21. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

22. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
23. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
24. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
25. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

26. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
27. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
28. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
29. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
30. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

31. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
32. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
33. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
34. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

35. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
36. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

37. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
38. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

39. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
40. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
41. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
42. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

43. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
44. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
45. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
46. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
47. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
48. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
49. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

50. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

51. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

52. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

53. Best Cloud-Based Queue Management Software | Qwaiting

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

54. Qwaiting Pricing Plans - Queue Management Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

55. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

56. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

57. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

58. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

59. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

60. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
61. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
62. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

63. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

64. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

65. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

66. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
67. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
68. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

69. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
70. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
71. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
72. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

73. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
74. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
75. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
76. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
77. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

78. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

79. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

80. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

81. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

82. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
83. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.2. China

Table 295. China Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
China	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 296. China Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 297. China Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 298. China Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 299. China Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 300. China Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 301. China Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 302. China Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 303. China Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
37. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
78. RetailNext Majority Growth Investment From Battery Ventures
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
80. Assess crowd safety risks and identify hazards
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.3. Germany

Table 304. Germany Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Germany	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 305. Germany Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 306. Germany Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 307. Germany Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 308. Germany Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 309. Germany Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 310. Germany Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 311. Germany Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 312. Germany Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

37. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
82. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.4. United Kingdom

Table 313. United Kingdom Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
United Kingdom	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 314. United Kingdom Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 315. United Kingdom Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 316. United Kingdom Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 317. United Kingdom Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 318. United Kingdom Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 319. United Kingdom Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 320. United Kingdom Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 321. United Kingdom Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts.
([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts.
([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
37. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
82. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.5. Japan

Table 322. Japan Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Japan	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 323. Japan Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 324. Japan Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 325. Japan Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 326. Japan Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 327. Japan Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 328. Japan Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 329. Japan Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 330. Japan Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
37. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.6. France

Table 331. France Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
France	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 332. France Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 333. France Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 334. France Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 335. France Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 336. France Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 337. France Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 338. France Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 339. France Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
37. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.7. India

Table 340. India Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
India	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 341. India Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 342. India Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 343. India Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 344. India Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 345. India Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 346. India Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 347. India Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 348. India Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. The ICT Development Index 2024
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Regional peer calibration only; the Indian score is an explicit assumption.

2. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

3. LEGION | Bentley Systems
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

4. Qmatic Welcomes New CEO and Vice CEO
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

5. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

6. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

7. People Counting System Pricing - Nano AI + BoostBI | V-Count

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

8. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

9. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
10. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

11. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

12. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

13. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
14. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
15. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

16. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
17. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
18. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
19. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
20. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
21. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

22. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
23. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
24. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
25. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

26. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
27. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
28. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
29. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
30. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

31. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
32. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
33. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
34. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

35. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
36. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

37. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

38. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

39. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
40. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
41. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
42. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

43. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
44. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
45. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
46. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
47. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
48. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
49. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

50. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

51. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

52. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

53. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

54. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

55. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

56. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

57. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

58. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

59. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

60. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
61. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
62. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

63. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

64. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

65. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

66. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
67. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
68. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

69. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
70. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
71. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
72. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

73. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
74. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
75. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
76. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
77. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

78. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

79. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

80. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

81. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

82. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

83. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.8. Russia

Table 349. Russia Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Russia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 350. Russia Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 351. Russia Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 352. Russia Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 353. Russia Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 354. Russia Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 355. Russia Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 356. Russia Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 357. Russia Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

37. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.9. Italy

Table 358. Italy Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Italy	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 359. Italy Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 360. Italy Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 361. Italy Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 362. Italy Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 363. Italy Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 364. Italy Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 365. Italy Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 366. Italy Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

13. Event Access Control & Management - We are InSite

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

14. End of Life Announcement: Qmatic Show

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

37. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.

66. Crowd Connected Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))

67. Qminder Terms of Service

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.10. Canada

Table 367. Canada Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Canada	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 368. Canada Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 369. Canada Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 370. Canada Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 371. Canada Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 372. Canada Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 373. Canada Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 374. Canada Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 375. Canada Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
37. The Halo System - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
61. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.11. Spain

Table 376. Spain Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Spain	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 377. Spain Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 378. Spain Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 379. Spain Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 380. Spain Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 381. Spain Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 382. Spain Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 383. Spain Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 384. Spain Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

13. Event Access Control & Management - We are InSite

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

14. End of Life Announcement: Qmatic Show

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

37. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))

60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))

61. QueueRite Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.12. Brazil

Table 385. Brazil Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Brazil	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 386. Brazil Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 387. Brazil Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 388. Brazil Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 389. Brazil Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 390. Brazil Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 391. Brazil Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 392. Brazil Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 393. Brazil Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Customer stories - Alliar Médicos à Frente

   · Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.

   · Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier describes a Brazilian healthcare organization with more than xx.xx care units; licensed-unit count and revenue are not disclosed.

2. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

3. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

4. Qmatic Welcomes New CEO and Vice CEO
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

5. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

6. accesso Technology Group plc - Results for the six months ended 30 June 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

7. People Counting System Pricing - Nano AI + BoostBI | V-Count

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

8. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

9. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
10. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

11. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

12. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

13. Crowd controls inside the venue - HSE

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

14. Event Access Control & Management - We are InSite

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

15. End of Life Announcement: Qmatic Show

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

16. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
17. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
18. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
19. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
20. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
21. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

22. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
23. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
24. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
25. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

26. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
27. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
28. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
29. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
30. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

31. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
32. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
33. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
34. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

35. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
36. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

37. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

38. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

39. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
40. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
41. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
42. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

43. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
44. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
45. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
46. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
47. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
48. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
49. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

50. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

51. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

52. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

53. Best Cloud-Based Queue Management Software | Qwaiting

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

54. Qwaiting Pricing Plans - Queue Management Software

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

55. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

56. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

57. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

58. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

59. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

60. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
61. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
62. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

63. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

64. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

65. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

66. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
67. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
68. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

69. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
70. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
71. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
72. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

73. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
74. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
75. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
76. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
77. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

78. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

79. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

80. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

81. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

82. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
83. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.13. South Korea

Table 394. South Korea Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
South Korea	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 395. South Korea Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 396. South Korea Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 397. South Korea Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 398. South Korea Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 399. South Korea Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 400. South Korea Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 401. South Korea Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 402. South Korea Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

37. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
61. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.14. Australia

Table 403. Australia Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Australia	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 404. Australia Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 405. Australia Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 406. Australia Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 407. Australia Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 408. Australia Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 409. Australia Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 410. Australia Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 411. Australia Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))

13. Event Access Control & Management - We are InSite

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))

14. End of Life Announcement: Qmatic Show

- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

37. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
61. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

17.15. Mexico

Table 412. Mexico Crowd Management Software Market Size, 2017-2040 (USD Million)

Country	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Mexico	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 413. Mexico Crowd Management Software Market Size, by Software Offering, 2017-2040 (USD Million)

Software Offering	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Admission Control Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Guidance and Communication Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Monitoring and Analytics Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Operations Coordination Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Planning and Simulation Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Integrated Crowd Management Suites	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Queue and Arrival Management Software	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 414. Mexico Crowd Management Software Market Size, by Crowd Data Source, 2017-2040 (USD Million)

Crowd Data Source	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Admission and Queue Records	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Human-Reported Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Image and Video Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Mobile Location Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Multi-Source Data Fusion	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Non-Imaging Sensor Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Scenario and Design Inputs	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wireless Signal Data	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 415. Mexico Crowd Management Software Market Size, by Application, 2017-2040 (USD Million)

Application	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Capacity and Space Planning	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Commercial Performance Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Crowd Safety and Security	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Emergency Preparedness and Response	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Flow and Queue Efficiency	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Staffing and Resource Optimization	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Visitor Guidance and Experience	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 416. Mexico Crowd Management Software Market Size, by End User, 2017-2040 (USD Million)

End User	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Accommodation and Food Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Education and Libraries	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Finance and Insurance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Government and Public Safety	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Healthcare and Social Assistance	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Industrial and Infrastructure Operators	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Information and Telecommunications	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Leisure Attractions and Cultural Institutions	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Personal Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Professional and Business Services	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Real Estate and Facilities Management	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Religious and Membership Organizations	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Sports and Live Events	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Transportation and Logistics	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Wholesale and Retail Trade	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 417. Mexico Crowd Management Software Market Size, by Deployment Model, 2017-2040 (USD Million)

Deployment Model	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Hosted	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Hybrid	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
On-Premises	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 418. Mexico Crowd Management Software Market Size, by License Term, 2017-2040 (USD Million)

License Term	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Perpetual Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Term Licenses	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 419. Mexico Crowd Management Software Market Size, by Sales Channel, 2017-2040 (USD Million)

Sales Channel	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Direct Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indirect Sales	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Table 420. Mexico Crowd Management Software Market Size, by Operating Environment, 2017-2040 (USD Million)

Operating Environment	2017	2024	2025	2026	2027	2032	2040	CAGR (%)
Indoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Indoor and Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Outdoor	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx	xx.xx
Total	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**	**xx.xx**

Sources & Evidence

1. Pathfinder Pricing

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual Pathfinder offers of USD xx.xx for node-locked and USD xx.xx for floating licenses constrain professional planning-software unit economics. They support a price comparison for the modeled base and forecast weights, not observed global seats or future prices. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with volume-discount eligibility. These constrain the inherited planning-seat realization; they are not observed 2025 invoices or proof of the 2032 allocation.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: One-year prices of USD xx.xx node-locked and USD xx.xx floating constrain planning-software realization, not the assumed capacity-versus-emergency purchasing split.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Paid all-feature software licensing supports the planning cohort's economic basis; current list prices do not observe 2025 realizations or future emergency revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder advertises USD xx.xx node-locked and USD xx.xx floating one-year licenses, with single-computer or network licensing and dark-site compatibility. These support local planning-software economics and the distinction between term licensing and Hosted execution. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

2. LEGION | Bentley Systems

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The LEGION offer starts at USD xx.xx for a xx.xx-month subscription containing one license and training/service credits. This independently challenges a universal low planning-license price and supports separating software entitlement from bundled services; it does not establish the global revenue-weighted price. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises LEGION under a xx.xx-month subscription bundled with training/service credits. Supports term-offering availability and the bundle-adjustment premise, not observed 2025 sales or future share. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION provides a publisher-facing purchase route. Its subscription includes software and training/service credits, supporting separate channel classification and software-only valuation rather than use of the whole advertised bundle as software revenue.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LEGION identifies stations, office complexes and theaters among planning settings. Its subscription bundles one license with training/service credits; these do not represent additional software licenses or observed indoor sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published planning settings also include piazzas, and the product addresses populated spaces before implementation. This establishes outdoor planning relevance without treating planning examples as live monitoring or sales weights. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The package combines Model Builder and Simulator and supports varied physical settings. Actual intended cross-environment use remains an allocation assumption; general capability alone does not establish a combined purchased entitlement. ([bentley.com](https://www.bentley.com/products/legion/))

3. Qmatic Welcomes New CEO and Vice CEO

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic's January xx.xx 2025 announcement reports more than xx.xx systems. This constrains the scale of the inherited queue-deployment model but does not measure active paying installations, software revenue or future adoption. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic reports more than xx.xx systems across more than xx.xx countries. This supports the scale of the institutional queue estate but does not establish active paying installations, software-only revenue or future shares.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 company disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. This constrains overall queue scale and confirms sector participation, not active paying healthcare counts or a disclosed healthcare share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The reported system estate includes finance; it supports a substantial financial-service queue cohort but does not disclose sector billings.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public services are included in the reported 2025 system estate, supporting the public-administration queue model without measuring its exact proportion.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 disclosure reports more than xx.xx systems across finance, healthcare, retail and public services. It supports the scale and indoor-heavy queue premise, not active-license counts, observed environment shares or the forecast adoption rate. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

4. Qmatic | FAQs
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The modular queue, appointment and analytics offering supports attribution to an arrival-to-service workflow rather than treating every additional feature as a separately purchased software category. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Modular product availability qualifies the suite-allocation premise: portfolio breadth alone cannot establish an inseparable multi-workflow contract or its sales share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes Orchestra as an on-premises platform, supporting the local-execution category premise rather than a measured revenue percentage. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Experience Cloud is identified as multi-tenant SaaS, supporting a Hosted application category and forecast availability premise, not its global share. ([qmatic.com](https://www.qmatic.com/resources/faq))

5. accesso Technology Group plc - Results for the six months ended 30 June 2026

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue was USD xx.xx in H1 2026 versus USD xx.xx in H1 2025. This supplies independent counterevidence to uniform royalty growth and supports retaining the inherited contract-loss adjustment; it does not verify the modeled full-year royalty amounts. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/accesso-H126-Results-RNS-FINAL.pdf))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half virtual-queuing revenue fell from USD xx.xx to USD xx.xx, constraining the inherited royalty forecast partly allocated to flow.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Observed customer-contract-related royalty decline is counterevidence to automatic visitor-software expansion; it does not observe the future purpose mix.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The royalty decline supports forecast caution despite a broader commercial proposition, without proving the modeled commercial share.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: First-half 2026 virtual-queuing revenue was USD xx.xx versus USD xx.xx in first-half 2025, with disclosed contract changes and seasonality. This supports a contraction mechanism, not independent verification of the modeled 2032 royalty amount.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queuing revenue falls from USD xx.xx in H1 2025 to USD xx.xx in H1 2026 following customer contract changes. This independently supports the inherited royalty contraction as a forecast mix counterforce, not a measured sales-channel percentage.

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed royalty change affects the relative economic weight used in the complementary channel forecast. Accesso's separate ticket-distribution revenue is not treated as indirect crowd-software sales.

6. People Counting System Pricing - Nano AI + BoostBI | V-Count
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: BoostBI analytics is published at USD xx.xx-xx.xx per sensor per month, separately from sensor hardware. This supports a recurring software-price range containing the inherited USD xx.xx midpoint assumption, not a verified 2025 global realized price or paid-channel count. ([v-count.com](https://v-count.com/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 pricing page separates one-time hardware from USD xx.xx-xx.xx monthly analytics. USD xx.xx is an illustrative rate, qualifying the inherited USD xx.xx annual monitoring assumption rather than directly verifying it.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The published software range constrains the common fee-normalized monitoring model; it does not establish the realized price or prevalence of fusion entitlements.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Software pricing of USD xx.xx-xx.xx per sensor per month constrains monitoring value weights; it does not disclose planning-led customer mix.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately stated recurring analytics pricing supports software-only monitoring valuation, not the assumed safety-purpose fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue analytics are selectable commercial features; the USD xx.xx example is illustrative rather than a universal quoted rate.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The software is positioned for staffing decisions, while realized operating savings remain customer-dependent.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Traffic/POS conversion features support commercial-purpose classification, not a measured global revenue fraction.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Published BoostBI software pricing of USD xx.xx-xx.xx per sensor monthly constrains the inherited USD xx.xx annual monitoring realization. USD xx.xx monthly is illustrative, not an observed realized market price.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property monitoring numerator.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate hardware and per-sensor software pricing supports excluding device purchase value from the property

7. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2022 memorandum budgets USD xx.xx over ten years, or USD xx.xx annually, for recurring service, license or maintenance obligations. It provides a complex-site monetary comparison after an explicitly assumed software attribution, not observed software-only revenue. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The annualized mixed-contract budget constrains the scale of the modeled focused-versus-suite fee tiers. It does not establish the suite premium, global contract count or actual contract mix. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 proposal recommends consolidating new and existing information with a USD xx.xx ten-year recurring budget, versus more than USD xx.xx for extensive tracking. This constrains purchasing economics but does not prove implementation, paid fusion adoption or realized software revenue.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2022 passenger-flow procurement estimated USD xx.xx of recurring fees over ten years and included assessment of future construction impacts, constraining the complex-contract planning allocation without observing its global share.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Passenger journey-time measurement and alerts to airport operations support the flow-purpose attribution; the budget is not realized software revenue or a future application-share observation.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The airport memorandum identifies a USD xx.xx ten-year recurring budget and USD xx.xx annual recurring estimate. It supports the inherited annualization and operating-customer attribution; the xx.xx% software share remains assumed.
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx ten-year recurring budget. It constrains the inherited complex-contract valuation but does not disclose the underlying application-use duration. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2022 memorandum combines software licenses, service and maintenance in an estimated USD xx.xx

8. 5 easy packages to buy Halo for venues
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ticket scanning is offered separately from the core coordination package, from GBP xx.xx. This supports separable admission functionality, not an annual global admission-software price or sales weight. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual coordination tiers include GBP xx.xx and GBP xx.xx while smaller free and paid tiers also exist. These constrain paid venue fee assumptions; bundled training and unrelated operations require exclusion. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately offered modules qualify automatic suite classification and provide component-price context for the explicitly assumed composite venue-suite weight. The document does not disclose inseparable-suite sales. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))
9. Pricing | SaaS Pricing for Ticketing & POS | Venue Manager
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Access Control is separately priced at DKK xx.xx per entrance per month, effective January xx.xx 2026, with setup and hardware listed separately. Five assumed entrances provide a comparable annual subscription near the modeled USD xx.xx price weight after currency conversion. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))
   - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate subscriptions for access control, ticketing and other products support avoiding attribution of an entire venue platform to a crowd-management suite solely because the supplier offers multiple modules. ([venuemanager.net](https://www.venuemanager.net/pricing/))

10. Digital Signage Software Pricing - ScreenCloud

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Annual-billing Core and Pro prices are USD xx.xx and USD xx.xx per screen per month. Their midpoint and an assumed five-screen footprint constrain the USD xx.xx annual guidance price weight, subject to software-only attribution and exclusion of non-crowd communication uses. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The separately purchasable communication subscription supplies one component-price comparison for the modeled venue-suite weight; it does not establish actual suite pricing or adoption. ([screencloud.com](https://screencloud.com/pricing))

11. Federal Reserve Board - Foreign Exchange Rates, G.5A, January 5, 2026

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is DKK xx.xx per USD, providing the currency bridge for the Danish per-entrance subscription comparison. This is a price-comparison conversion, not a forecast exchange rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The official 2025 average is USD xx.xx per GBP, allowing comparison of UK annual coordination tiers with the modeled USD fee weight. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The same official currency bridges support component-price calibration of the assumption-led venue-suite weight, not observed suite revenue. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/xx.xx/))

12. Crowd controls inside the venue - HSE
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Public information and visitor directions are identified separately from staff command arrangements. This supports the guidance allocation boundary, not a software-purchase mandate or numerical sales weight. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The guidance separately identifies staff command structures and coordination of information and responses. This supports distinguishing staff-facing coordination from visitor-facing communication without including all general incident software. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-control-inside.htm))
13. Event Access Control & Management - We are InSite
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier links ticket validation with live capacity alerts and capacity-constrained entry decisions. This corroborates the admission attribution boundary, but provides no global revenue or deployment weight. ([weareinsite.com](https://www.weareinsite.com/event-access-control-and-management/))
14. End of Life Announcement: Qmatic Show
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 announcement schedules support cessation for October xx.xx 2027 and says the application can continue running. It supports a conditional renewal-risk mechanism, not an observed migration cohort or compulsory software-purchasing spike. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced October xx.xx 2027 support cessation supports a replacement condition, not a quantified queue purchasing spike.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: No affected paid-cohort count or resource-application conversion is disclosed, supporting restraint against adding automatic staffing monetization.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Continued operation and possible hardware requirements qualify the visitor-display replacement opportunity; replacement does not itself establish incremental software demand.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The October xx.xx 2026 notice sets Qmatic Show's support cessation for October xx.xx 2027 while stating that the application can continue running. This supports a conditional renewal trigger, not compulsory abandonment of local execution. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The dated support deadline creates an opportunity to reconsider delivery arrangements, but the notice provides neither affected software revenue nor a required move to Hosted delivery. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))

15. Gentrack Group - FY25 Investor Presentation
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo reports FY2025 recurring growth of xx.xx%, with different project and hardware movements. This provides a broader commercial comparison for the complex-site forecast, not a crowd-specific market growth rate. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The disclosed recurring growth supports ongoing commercial demand but does not identify inseparable crowd-suite contracts or verify the modeled suite mix shift. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))
16. Traffic Modelling Guidelines v4
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pedestrian guidance identifies layout, demand and proposed-facility assessment inputs, supporting the scenario/design source boundary rather than a sales weight.
17. QtracVR Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The application description identifies service registration, unique call numbers and queue-state events, supporting transaction-record attribution independently of the customer's interface device.
18. Xovis Brings Groundbreaking AI-Powered Solution to NRF 2026
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis identifies stereovision sensors and reports more than xx.xx installed sensors and more than xx.xx airport users. These gross activity proxies support a substantial imaging estate while challenging the smaller frozen combined-stock reference; they are not paid software counts.
19. Why Enterprise Retailers Choose RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The March xx.xx 2026 company article reports nearly xx.xx sensors. This is a later gross-stock comparator, not a dated 2025 paid crowd-software observation, and requires overlap and scope adjustments.
20. Multi-Brand Product Showrooms
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The showroom case describes substantive combination of imaging and radio-source information, supporting a commercial fusion boundary rather than classifying every optical supplier entitlement as imaging-only.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The mixed application provides a countercheck against assigning an entire supplier sensor estate to single-source imaging software.

21. Compare Workplace Utilization Solutions for Smarter Spaces
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Density identifies radar-based offerings and separates hardware from annual data fees; its USD xx.xx monthly Waffle data option constrains value-equivalent conversion and argues against assuming identical physical-device prices or a privacy premium.
22. Ouster Accelerates Software Adoption in 2025 with Record Bookings and Global Expansion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Ouster reports doubled software-attached bookings in 2025 and more than xx.xx contracted Gemini sites. Its broader logistics, security and transportation scope requires deductions and does not establish realized crowd-software revenue or the forecast growth rate.
23. A Guide to the Passenger Movement Sensor Landscape
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Veovo distinguishes venue-detected Wi-Fi/Bluetooth observations from direct people counts and discusses coverage and device-randomization limitations, supporting restrained signal-only substitution assumptions.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company's platform description combines signal observations with boarding-pass, counter, camera or LiDAR information, supporting substantive fusion as a commercial source dependency without establishing its paid prevalence.
24. Location Analytics and Footfall Counting
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Crowd Connected describes location analytics through the customer's mobile application, supporting separation from venue radio sensing and limiting the observed population to participating app users.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Sponsor, tenant and concession engagement reporting supports commercial-purpose classification of qualifying crowd analytics, without demonstrating sales improvement or the modeled percentage.

25. About Crowd Connected
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports more than xx.xx venues and more than xx.xx deployments since 2022 across a mixed location, tracking and counting portfolio. These constrain commercial plausibility only; they are not annual paid mobile-location licenses.
26. Halo Solutions to Help Keep People Safe at the Belfast Arena
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The February xx.xx 2025 announcement describes a three-year Belfast arena software agreement and mobile incident reporting. It establishes contracted commercial use, but does not disclose the license value or worldwide paid installation count.
27. Our Impact - Halo Solutions
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo offers free software to qualifying small venues and businesses, requiring exclusion of nonpaying deployments from the human-reporting revenue model.
28. accesso LoQueue Virtual Queuing System
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso describes reservations and ride events as inputs to virtual-queue dashboards, supporting transaction-record attribution of the inherited software-royalty component rather than inferring mobile-location sensing from mobile delivery.
29. UCLA Facilities - Space Optimization Pilot Programs
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The five-building occupancy pilot identifies space reallocation as an intended use; this supports the planning boundary, not a global sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Flexible custodial deployment to higher-traffic locations supports a distinct resource-decision purpose, without demonstrating purchased software mix or workforce savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: UCLA identifies a five-building occupancy pilot, with planning launched in October 2024 and deployment intended from February 2025. This supports institutional operating demand but not a university-wide paid rollout.

30. Health and Safety Executive - Monitor the crowd
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Monitoring total numbers, distribution and developing crowd problems supports routine safety attribution, but does not establish software spending or emergency-response capability.
31. Health and Safety Executive - Planning for incidents and emergencies
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separate emergency-planning and responsibility requirements support restricting emergency attribution to an emergency-specific commercial purpose; the guidance supplies no application sales percentage.
32. Thunderhead Engineering - Pathfinder Crowd Movement Simulation and Egress Software
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The commercial offering includes circulation and entry-planning applications, supporting the planning-purpose mapping without establishing a numerical sales weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Emergency-preparedness and egress applications establish a separately identifiable commercial use within planning software, not the assumed xx.xx% attribution.
33. Port of Seattle - Spot Saver Virtual Queue Program, Commission Agenda Memorandum, September 28, 2021
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Virtual-queue alternatives separately budget recurring software/service obligations and customer-support labor, supporting a software-only queue-purpose allocation rather than total program spending.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Different gate and labor alternatives show why reduced support labor cannot automatically be attributed to software or counted as staffing-software revenue.

34. IMDA - In-Store Analytics Pre-Approval Onboarding Guide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Queue-length and waiting-time insights are linked to checkout-process optimization, supporting the efficiency-purpose boundary rather than an observed purchasing share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Staff allocation is separately identified as a queue-insight use, supporting distinct resource attribution without proving labor savings.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Customer Queue Insights is marked preferred rather than mandatory. This constrains the model against assuming universal retail queue adoption.
35. Omnivex - Leverage Digital Signage for Crowd Control
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Visitor-facing wait-time information, occupancy messaging and wayfinding support a delivery-based visitor application boundary; no revenue mix is disclosed.

36. accesso Technology Group plc - Annual Report and Accounts 2023

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: USD xx.xx of 2023 transactional virtual-queuing revenue, excluding staffing reimbursements, anchors the inherited royalty cohort partly attributed to flow.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical guest-experience revenue category provides a monetary input to modeled visitor attribution, not an observed 2025 or 2032 purpose share.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Transaction-based monetization supports the royalty cohort's commercial economic role; the assumed principal-purpose fraction remains unobserved.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2023 filing separately reports USD xx.xx virtual-queuing transactional revenue and USD xx.xx staffing reimbursement. This supports the inherited software-only attraction royalty proxy and exclusion of staffing.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Describes virtual-queuing performance obligations as contracted platform access and reports USD xx.xx of 2023 transactional queuing revenue separately from staffing reimbursement. Supports the inherited royalty component's commercial boundary and modeled term-access attribution; extension to other suppliers remains assumed. ([accesso.com](https://accesso.com/wp-content/uploads/2025/xx.xx/2023-Annual-Report-and-Financial-Statements.pdf))

37. The Halo System - Halo Solutions

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Halo reports xx.xx-plus locations across its broader platform and identifies use at the Abu Dhabi F1 Grand Prix. This is a commercial-scale and operating-role check, not a count of qualifying paid crowd-software venues.
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Multi-location operations and the Liverpool ONE customer example support distinguishing property/common-area software customers from tenant retailers; no revenue split is disclosed.

38. Retail Analytics Company | Who We Are | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company describes approximately xx.xx proprietary sensor installations and more than xx.xx retail customers across over xx.xx countries. This supports retail monitoring scale, with an explicit current-to-2025 bridge and paid-software qualification.
39. Xovis - Swiss precision measures people flows worldwide
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 account reports xx.xx Xovis sensors across retail, airports, transport and smart buildings. Its conflict with another official stock disclosure limits monitoring calibration; it is not treated as paid software volume.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Smart-building participation supports the property monitoring boundary, while the unreconciled installed-stock definition prevents precise sector-volume inference.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The November xx.xx 2025 company interview reports xx.xx deployed sensors across airports, retail, transport and smart buildings. It constrains the inherited monitoring stock proxy, while environment attribution, paid conversion and software-only realization remain modeled. ([s-ge.com](https://www.s-ge.com/export/en/articles/success-stories/xovis-swiss-precision-measures-people-flows-worldwide))
40. Holiday 2024 Air Travel a Test for Tech Advances at Global Airports
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 company release reports more than xx.xx installed sensors, conflicting with the later xx.xx account. The unresolved perimeter is retained as a monitoring-allocation limitation rather than averaged into an input.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The release identifies smart-building customers but does not disclose their software billings or paid share of the sensor estate.
41. TO SUPPLY, DELIVER, INSTALL AND TESTING & COMMISIONING OF AN APPOINTMENT AND QUEUE MANAGEMENT SYSTEM (AQMS) - TMC LIFE
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hospital appointment and queue-system invitation opened February xx.xx 2026 and closed March xx.xx 2026. It supports intended hospital purchasing responsibility, not an award or observed revenue.

42. Capitec Makes Banking Easier for Customers with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier case describes a platform managing xx.xx Capitec branch offices, while its overview gives a different xx.xx-plus description. It provides historical banking deployment scale, not an exact current census or global revenue share.
43. Queue Management System at the Poltavavodokanal Customer Service Center
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The supplier reports a September 2024 utility customer-service-center deployment with three licensed operator workstations. This establishes a qualifying people-flow software example rather than generic industrial asset software.
44. Simulating pedestrian vision and wayfinding with Oasys MassMotion
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Oasys identifies Efficiency Lab for Architecture using MassMotion on an educational project. This supports attributing professional planning licenses to the professional user rather than automatically to the building operator.
45. Pathfinder Partners
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The publisher reports a xx.xx-plus design-firm footprint and xx.xx international partners. This constrains professional planning-market scale but does not disclose active paid seats or validate the assumed seat allocation.
46. Virtual Queue Management at Applebee's | Waitwhile
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The restaurant case describes a xx.xx-location rollout across xx.xx states. It supports restaurant operating-customer participation without establishing current paying retention, annual software fees or a global adoption rate.
47. Telecom Company GTA Redefines its Customer Experience with Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The case identifies GTA in Guam, five branches and approximately xx.xx monthly in-store customers. It supports telecom operating-customer attribution, not treating every telecom storefront as a trade-sector customer.
48. SenSource Case Study: Grace Family Church
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: SenSource reports an attendance-analytics relationship covering six Grace Family Church campuses. This establishes an actual religious operating-user example, not global paid-campus or channel counts.

49. Intuitive appointment scheduling at Sgro’s Barbershop | Waitwhile

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Waitwhile reports more than xx.xx appointments booked in 2021 at Sgro's Barbershop and continued application use after restrictions. This supports personal-service application participation, not disclosed subscription revenue or a global paid cohort.

50. Attendee tracking | Real-time event attendance and session data

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The company reports xx.xx-plus attendee-tracking deployments, operations in xx.xx countries and xx.xx-xx.xx events weekly. This constrains event commercial scale; mixed hardware/license packages and repeat deployments require software-only attribution and annualization.

51. Scott County Board of Supervisors, May 14, 2020 Agenda and Enclosures - Customer Queueing Application Upgrade

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The May 2020 procurement package proposes an AWS-hosted Orchestra xx.xx arrangement for three locations and xx.xx users with a five-year commitment. Separately quoted software, maintenance, hosting, messaging and services support deployment classification and valuation adjustments; the proposal is not realized revenue. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The hosted Orchestra proposal qualifies any automatic assignment of all Orchestra or legacy-license revenue to On-Premises. ([www3.scottcountyiowa.gov](https://www3.scottcountyiowa.gov/board/pub/enclosures/2020/20200514_Committee_of_the_Whole_AND_Board_Meeting_5PM/00_Agenda_and_Enclosures.pdf))

52. Best Cloud-Based Queue Management Software | Qwaiting

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qwaiting distinguishes its connectivity-dependent cloud offering from local deployment, supporting the Hosted classification premise without measuring adoption. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The provider describes an alternative that runs queues on the customer's local network for offline requirements, supporting retained local demand as a modeling condition. ([qwaiting.com](https://qwaiting.com/products/cloud-based-software))

53. Qwaiting Pricing Plans - Queue Management Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Current annual SaaS offers of USD xx.xx USD xx.xx and USD xx.xx provide a commercial price comparison for the inherited modern queue-software realization. They are not dated 2025 transactions or a deployment-share census. ([qwaiting.com](https://qwaiting.com/pricing))

54. Jacksonville Aviation Authority, April 28, 2025 Awards Committee Agenda - Xovis AERO Passenger Flow Management System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April 2025 Xovis AERO renewal submission describes an installed controller/cloud passenger-flow system, USD xx.xx annual renewal and a USD xx.xx five-year potential ceiling. This supports Hosted commercial activity, contract scale and renewal timing, but does not isolate software-only consideration or prove realized spending. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

55. Crowd watch: DASA funded AI and LiDAR innovation helps enhance crowd safety

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The April xx.xx 2024 government account describes crowd information sent to cloud servers for analysis and alerts. It supports an externally hosted application component, not a quantified software-revenue share. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Local tracking equipment plus external analysis does not establish material application execution in both environments; this constrains the Hybrid numerator against sensor-based overclassification. ([gov.uk](https://www.gov.uk/government/news/crowd-watch-dasa-funded-ai-and-lidar-innovation-helps-enhance-crowd-safety))

56. Wavetec's Cutting-Edge Implementation of Kubernetes Architecture

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Wavetec's earlier company announcement states that its customer queue systems encompass cloud, on-premises and Hybrid deployments. This supports commercial availability before the forecast interval, not customer adoption or revenue prevalence. ([wavetec.com](https://www.wavetec.com/news/wavetec-implementation-of-kubernetes-architecture-xx.xx/))

57. Cloud vs On-Premise Queue Management Systems: Which Is Better? | Wavetec

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: In its April xx.xx 2026 description of its own offering, Wavetec identifies local queue cores combined with cloud analytics and notifications. The substantive local-plus-external application arrangement supports the Hybrid forecast premise; third-party market-research percentages on the page are not used. ([wavetec.com](https://www.wavetec.com/blog/queue-management/cloud-vs-on-premise-queue-management-systems/))

58. The Wait is Over: How Virtual Queuing is Improving Venue Guest Experiences | accesso

· Evidence informing base-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

· Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: accesso's October xx.xx 2025 account identifies LoQueue as cloud-based, supporting the Hosted emphasis in the inherited usage-royalty cohort. It does not establish the modeled global deployment percentage. ([accesso.com](https://accesso.com/learn/the-wait-is-over-how-virtual-queuing-is-improving-venue-guest-experiences/))

59. Software Licenses | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supports classifying indefinite application rights separately from the duration of maintenance obligations. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Specified-period application rights establish the term-license classification; billing cadence alone is not the modeled criterion. ([gsa.gov](https://www.gsa.gov/technology/it-contract-vehicles-and-purchasing-programs/multiple-award-schedule-it/software-licenses))
60. City and County of Denver-Q-Matic Corporation Agreement, CLERK-201310119-00
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The historical Denver agreement grants perpetual application-use rights while separately pricing annual software maintenance. This supports a continuing perpetual-associated revenue stream, not the size of the 2025 installed cohort or future retention. ([denver.legistar.com](https://denver.legistar.com/View.ashx?GUID=BE0DF1D5-2EEA-xx.xx-A0E2-FA938EAE297A&ID=xx.xx&M=F))
61. QueueRite Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Advertises a USD xx.xx perpetual server package with three teller licenses, excluding hardware and including delivery obligations. The modeled xx.xx% nonsoftware deduction and annual purchase/maintenance conversion are assumptions. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Basic annual-subscription pricing is USD xx.xx monthly per branch, equivalent to USD xx.xx annually. Used as a relative-price input, not a global realization or historical 2025 observation. ([queuerite.com](https://www.queuerite.com/pricing.do))

62. Pricing & Per-Solution ROI Calculators | Zeour Ltd

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes perpetual queue-management licensing with annual maintenance of xx.xx-xx.xx% and separates hardware obligations. Constrains the model's xx.xx% queue-maintenance assumption; does not establish global contract mix. ([zeour.co.uk](https://www.zeour.co.uk/pricing))

63. Smart Retail Counter - People Counting and Queue Analytics Software

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes same-product monitoring alternatives of USD xx.xx monthly per camera, USD xx.xx perpetual and optional maintenance of xx.xx% annually. Together with assumed xx.xx% annual license purchases, these yield a perpetual-to-term annual realization ratio of xx.xx. Enterprise extrapolation remains modeled. ([arsa.technology](https://arsa.technology/products/arsa-ai-video-analytics-software/smart-retail-counter/))

64. Pricing and Discounts | Purchasing, Licensing, & Support 2026.1 Docs

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder node-locked perpetual pricing is USD xx.xx with USD xx.xx annual maintenance. With the assumed purchase-flow rate, these constrain planning's annual relative realization, not its paid-seat duration mix. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Pathfinder one-year node-locked and floating offers cost USD xx.xx and USD xx.xx. Locally installed or network access therefore does not establish perpetual rights. ([thunderheadeng.com](https://www.thunderheadeng.com/docs/2026-xx.xx/purchasing-licensing/purchasing/volume-license-discount/))

65. Bentley Systems, Incorporated - 2025 Form 10-K
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The filing reports 2025 SELECT subscriptions of USD xx.xx and perpetual-license revenue of USD xx.xx, and describes SELECT as an addition to perpetual licenses. Used to challenge classification of all recurring revenue as term licensing, not as a crowd-market weight. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Separately identifies enterprise and term-license subscription arrangements. Portfolio mix provides a directional comparison only; it does not verify the forecast crowd-software split. ([sec.gov](https://www.sec.gov/Archives/edgar/data/xx.xx/xx.xx/bsy-xx.xx.htm))
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through direct channels. This is the planning-component calibration proxy, not an observed LEGION-specific or global crowd-software share.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Bentley reports approximately xx.xx% of 2025 total-company revenue through channel partners, supporting a nonzero intermediary route within the planning proxy. Its future mix is assumed, not disclosed.
66. Crowd Connected Pricing
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Publishes annual positioning contracts, including a USD/EUR 2,000 annual building offer, while event packages can include hardware rental. Supports term-oriented venue economics and software-only scope adjustments, not the modeled global mix. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))
67. Qminder Terms of Service
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Terms updated August xx.xx 2025 identify a publisher-client subscription agreement and fees payable to Qminder. This supports a direct commercial route for modern queue subscriptions, not the assumed global direct fraction.

68. Business Partnership Opportunities for Queue Management - Qmatic
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Qmatic describes partners selling its offerings to their clients and earning recurring cloud and customer-care revenue. This constrains an exclusively direct queue-software assumption; partner counts are not used as monetary weights.
69. New York City Record - December 23, 2024
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2024 City Record reports a USD xx.xx Q-Matic award to Technical Communities. The purchase includes hardware, software upgrades and services, establishing a historical intermediary transaction but not annual software-only revenue or a global allocation weight.
70. Channel Partner Program | RetailNext
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext distinguishes consulting, technology and deployment partners from resellers and acknowledges existing direct customers. Partner involvement therefore does not automatically reclassify software revenue as indirect.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: RetailNext explicitly describes resellers selling its solutions to retail customers. This supports an indirect monitoring route, while leaving its value fraction unmeasured.
71. Become a partner | Xovis
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Xovis describes analytics partners providing software that incorporates its sensor technology. This supports classifying software by its own provider-buyer relationship rather than automatically treating a sensor integrator as a software reseller.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The partner framework distinguishes analytics providers, OEM/system partners and value-added resellers. Only qualifying entitlement resale contributes to the modeled indirect software numerator; hardware and partner counts do not.

72. San Francisco Airport Commission - Minutes, December 2, 2025
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The December xx.xx 2025 minutes award Xovis USA a five-year queue-management system-support contract capped at USD xx.xx. This supports direct supplier contracting in complex sites, but is neither annual realized software revenue nor proof of the assumed direct fraction.
73. Qmatic Welcomes TechConnect as New Solution Partner in Australia
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2025 Australian solution-partner announcement explicitly combines Qmatic SaaS with partner delivery. It challenges automatic cloud-to-direct attribution without supplying a forecast channel-transfer rate.
74. Partners | WaitTime
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: WaitTime describes TD SYNNEX distribution of supporting hardware and services. This does not establish software-entitlement resale, preventing unsupported transfer of publisher software revenue to the indirect numerator.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Supporting hardware and service distribution is excluded as a standalone monetary weight for Indirect Sales; software resale consideration remains undisclosed.
75. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The August xx.xx 2026 announcement assigns Swiss delivery, implementation and support responsibilities to Corvice. It supports continuing intermediary capability, but neither discloses software seller-of-record revenue nor quantifies a channel-share change.
76. OneGov | GSA
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: OneGov combines direct manufacturer engagement with reseller purchasing access. This is a classification counterexample only; it does not establish crowd-software participation or a direct revenue weight.
    - Evidence informing base-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.
    - Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Reseller access can coexist with manufacturer-negotiated commercial terms, supporting final seller-of-record classification rather than classification by upstream negotiation.

77. Zoho Backstage - Terms of Use

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Zoho's terms identify the publisher-provided service and distinguish third-party services and device obligations. They support a publisher-contracting route and software-only scope for qualifying physical-event functions, not the assumed venue-channel percentage.

78. RetailNext Majority Growth Investment From Battery Ventures

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The January xx.xx 2025 release reports xx.xx retail brands, coverage in xx.xx countries and an average xx.xx retail-shop installations monthly during 2024. This supplies an indoor commercial-activity anchor and a qualified scale comparison for the forecast monitoring cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-majority-growth-investment-from-battery-ventures))

79. RetailNext Integrates Pine59 Mobile Intelligence For A Complete View Inside And Outside Stores

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The September xx.xx 2026 release reports nearly xx.xx in-store sensors worldwide. This is a current stock proxy bridged into the frozen 2025 monitoring model, not a dated 2025 paying-channel observation. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The announced integration connects in-store analytics with outside-store mobile intelligence, initially in the United States, with UK coverage planned for early 2027. Availability does not establish eligible crowd-management revenue, an inseparable entitlement or paid adoption; the forecast retains a limited assumed qualifying cohort. ([retailnext.net](https://retailnext.net/about/press/retailnext-pine59-a-complete-view-inside-and-outside-the-store))

80. Assess crowd safety risks and identify hazards

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: HSE recognizes outdoor spaces whose event boundaries are less well-defined. This supports a distinct physical-coverage category, not a software expenditure weight, price premium or forecast market share. ([hse.gov.uk](https://www.hse.gov.uk/event-safety/crowd-management-assess.htm))

81. accesso® Powers Virtual Queue for The Philadelphia Museum of Art Cassatt Exhibit

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: The 2024 Philadelphia Museum of Art exhibition deployment establishes an indoor LoQueue application. It challenges an outdoor-only classification of the royalty cohort but does not establish 2025 continuation, royalty terms or the modeled indoor percentage. ([accesso.com](https://accesso.com/news/accesso-powers-virtual-queue-for-the-philadelphia-museum-of-art-cassatt-exhibit/))

82. accesso LoQueue Virtual Queuing System

- Evidence informing base-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: LoQueue describes park-wide or single-ride deployment and reports cumulative use across more than xx.xx rides since 2021. This supports a park-oriented royalty cohort, not an observed Outdoor percentage or annual revenue conversion. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing base-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
- Evidence informing forecast-year allocation inputs; displayed values and growth are calculated: Park-wide software coverage can extend across different attraction settings, but the page does not disclose their physical-coverage entitlement mix. The combined royalty allocation remains explicitly modeled. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

18. Competitive Landscape

18.1. Market Share Analysis, 2025

Positioning in Crowd Management Software depends on access to a matched operating problem and the relationships needed to deliver it. WaitTime's documented Etihad installation illustrates entry through an existing infrastructure ecosystem, while the CVG, Groupe ADP, and Lyon xx.xx records support distinct airport-flow, spatial-monitoring, and institutional-reservation relationships. [redacted]

Latin American monitoring alternatives should not be collapsed into a single retail-analytics peer group. Pogen advertises occupancy control, Getin describes retail saturation information, and Aetherix markets EventMotion for event-area movement and density analysis. [redacted]

Local integration and measurement services create additional routes to those accounts. [redacted] Local delivery may be useful where implementation and ongoing assistance are the purchasing constraint, but it does not establish ownership of the application or eliminate upstream continuity dependencies.

[redacted] SCE INNOVATION's City-V, IBBVision's DLS Intelligence, LalinSoft's edition-based catalog, and ALGI's Algi Edge provide further advertised crowd or

video-analysis propositions. Their public descriptions support different commercial approaches, but not interchangeable local fulfillment or customer-specific approval.

Systems delivery remains separate from application ownership. Technical Arrow Technology Company describes crowd and access systems for Saudi venues, while Samco advertises UAE consultation, deployment, and support around crowd analytics. [redacted]

African service routes are similarly heterogeneous. [redacted] Buyers should require named applications and upstream rights before treating a local integrator, managed-service provider, and software publisher as equivalent contracting alternatives.

Asia-Pacific access also requires a project-specific comparison. [redacted] An institutional data-platform route may suit coordinated hub decisions; a narrower application can be preferable when the buyer lacks authority over the broader information relationships.

[redacted] A channel partner is commercially useful when it contributes documented local implementation, support, and escalation capability that the buyer needs. Direct engagement remains a realistic alternative where those resources are available internally; neither route should be selected before continuity and acceptance responsibilities are explicit.

Figure 30. Global Crowd Management Software Market Share, by Key Player, 2025

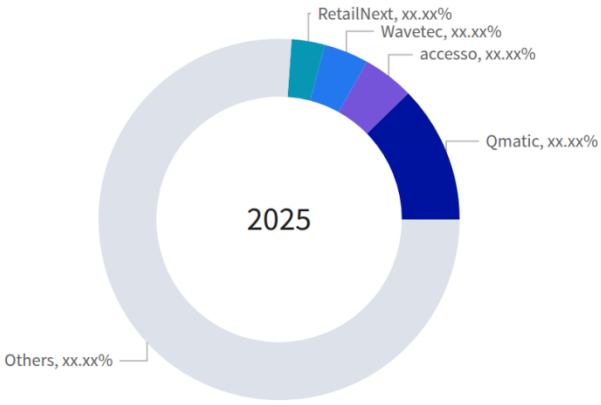

Table 421. Global Crowd Management Software Market Share, by Key Player, 2025

Key Player	Share (%)
accesso	xx.xx
Affluences	xx.xx
Copenhagen Optimization	xx.xx
Crowd Connected	xx.xx
Halo Solutions	xx.xx
Ipsotek Ltd	xx.xx
QLess	xx.xx
Qmatic	xx.xx
Qtrac, Inc.	xx.xx
RetailNext	xx.xx
Thunderhead Engineering	xx.xx
V-Count	xx.xx
VACAN	xx.xx
Veovo	xx.xx
Wavetec	xx.xx
Xovis	xx.xx
Others	xx.xx

Sources & Evidence

1. Partners | WaitTime
   · Supporting channel relationships require separate publisher, device, and service responsibility allocation. ([thewaittimes.com](https://www.thewaittimes.com/partners))

2. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   · Qmatic's August xx.xx 2026 announcement assigns Corvice AG Swiss delivery, implementation, and support roles, not a completed installation. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))
3. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
   · The dated installation illustrates ecosystem-based account entry, not current qualification of every module or deployment. ([newsroom.cisco.com](https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2022/m12/manchester-city-collaborates-with-cisco-to-deploy-crowd-intelligence-solution-waittime.html))
4. Innovation
   · CVG provides buyer-origin evidence of a named airport-flow relationship. ([cvgairport.com](https://www.cvgairport.com/business/innovation/))
5. Réserver des espaces - BU
   · The university's instructions provide buyer-origin support for an institutional reservation relationship. ([bu.univ-lyon3.fr](https://bu.univ-lyon3.fr/reserver-des-espaces-xx.xx))
6. At the heart of innovation in our airports - Groupe ADP
   · The operator record corroborates a particular spatial-monitoring relationship, not universal deployment suitability. ([essentiel.groupe-adp.com](https://essentiel.groupe-adp.com/en/at-the-heart-of-innovation-in-our-airports/))
7. SCAI - SCAI Motion
   · SCAI Motion advertises crowd applications and local Saudi-hosted cloud delivery; this is not customer-specific clearance. ([scai.sa](https://scai.sa/product/scai-motion))
8. Edge AI & IoT - inq.
   · inq. advertises managed-video and retail analytics including crowd management; its catalog does not settle upstream licensing or a transaction's seller. ([inq.inc](https://inq.inc/edge-ai-iot/))
9. General Terms and Conditions of Sale and Delivery - Version August 2026
   · Qmatic's distributor terms separate the reseller agreement from Q-MATIC AB's provider obligations and deny reseller authority to bind Qmatic. ([qmatic.com](https://www.qmatic.com/hubfs/General%20Terms%20and%20Conditions%20of%20Sale%20and%20Delivery%xx.xx%xx.xx.2026%xx.xx-xx.xx.pdf))
10. Pogen occupancy
    · Pogen markets Occupancy for occupancy monitoring, limits, admission availability, and platform alerts. ([contadores.pogen.com](https://contadores.pogen.com/pogen-occupancy-xx.xx))
11. Conteo de personas: optimiza tu tienda hacia 2026 | Getin
    · Getin's Mexico-facing article describes real-time retail saturation and occupancy applications, distinct from Brazilian Get In's queue proposition. ([getin.mx](https://getin.mx/blog/getin-lanza-semaforo-para-medir-la-saturacion-en-tiempo-real-al-interior-de-las-tiendas/))
12. Aetherix - Visión por computadora y mantenimiento predictivo
    · Aetherix markets EventMotion for event-area movement, dwell, density, and heatmaps. ([aetherix.mx](https://www.aetherix.mx/))
13. CLICR | Know your crowd. Grow your revenue.
    · CLICR advertises synchronized entry and exit counts and occupancy, while distinguishing pilots or testing from uniform paid adoption. ([clicrapp.com](https://www.clicrapp.com/))
14. Análise Avançada de Vídeo | Digifort
    · Digifort offers licensed video analytics including people counts, direction, and crowd-accumulation alerts. ([digifort.com](https://digifort.com/analise-avancada-de-video.php))
15. Defense IA e Defense IA Lite | Intelbras
    · Intelbras markets Defense IA crowd-related analytics and describes licensed acquisition through distributors. ([intelbras.com](https://www.intelbras.com/pt-br/software-defense))

16. Conteo de personas con IA y tus cámaras | KSI Vision
    - KSI Vision markets existing-camera people counts, queues, saturation, heatmaps, and dwell reporting. ([ksivision.com](https://www.ksivision.com/es/producto/conteo-de-personas))
17. Contagem de pessoas e veículos com câmeras e IA | Monuv
    - Monuv advertises camera-based flow counts, heatmaps, reporting, and integration through a subscription proposition. ([monuv.com.br](https://monuv.com.br/contar-fluxo-de-pessoas-e-veiculos/))
18. Control de Aforo y Conteo de Personas | Elipse Chile
    - Elipse advertises a Chile-facing capacity platform with dashboards, thresholds, and historical reporting. ([elipse.cl](https://www.elipse.cl/control-de-aforo/))
19. Regiscenter: conteo de personas y aforo | Registel
    - Registel markets Regiscenter for occupancy and flow information in terminals and high-traffic public spaces. ([registel.co](https://registel.co/productos/regiscenter))
20. Mais Fluxo
    - Mais Fluxo advertises flow measurement for shops and events and concentration heatmaps; proprietary licensing remains a separate question. ([maisfluxo.com.br](https://www.maisfluxo.com.br/))
21. Poken Perú
    - Poken Perú identifies an upstream Tecbrain alliance supporting its counting and capacity-related software-data service. ([poken-peru.com](https://www.poken-peru.com/))
22. Enova Apps - Enova
    - Enova lists capacity-control work within mobile and web software-development services, rather than a settled standalone license offer. ([enovatec.pe](https://enovatec.pe/enova-apps/))
23. Sagr | Crowd Management Platform for Events - Etlaq Company
    - Sagr identifies Etlaq Advanced Technologies Company and advertises participant flow, maps, communications, and analytics. ([sagr.net](https://sagr.net/en))
24. Sabeel | Infinity Solution
    - Infinity Solution's Sabeel page describes pilgrim services, movement heatmaps, density alerts, and capacity-related analytics. ([isolutionjo.com](https://isolutionjo.com/sabeel))
25. City-V - SCE INNOVATION
    - SCE INNOVATION markets City-V crowd analysis through a software-plan and distribution proposition. ([scegrup.com](https://www.scegrup.com/city-v/))
26. DLS Intelligence - IBBVision
    - IBBVision advertises DLS Intelligence crowd analysis, event management, and web dashboards. ([ibbvision.com](https://ibbvision.com/dls-intelligence))
27. Özellikler | LalinSoft
    - LalinSoft's edition-based catalog advertises crowd gathering, movement-direction analysis, and crowding warnings. ([lalinai.com](https://lalinai.com/features))
28. Yapay Zeka Tabanlı Video Analitiği | ALGI
    - ALGI presents Algi Edge with crowd, occupancy, heatmap, and queue-related functions; legal supplier attribution remains unresolved. (algi.ai)
29. Services | ArrowTech Saudi Arabia
    - Technical Arrow Technology Company advertises crowd and access systems for Saudi venues, including occupancy information and dashboards. ([arrowtech.sa](https://www.arrowtech.sa/services/))
30. AI Crowd Analytics Solutions In UAE | People Counting & Queue Monitoring | Samco
    - Samco advertises UAE crowd-analytics consultation, deployment, and support without establishing ownership of every underlying application. ([samco.ae](https://samco.ae/technology/video-analytics-solutions/crowd-analytics/))
31. AerWatch | AerVision Technologies
    - AerVision markets AerWatch as a named video-intelligence product with people-movement and crowd applications. ([aervision.com](https://www.aervision.com/aerwatch/))

32. AvidBeam Showcases AI Analytics at Hajj Conference 2025
    · AvidBeam's Hajj-related announcement establishes promotional activity, not a completed operational Hajj installation.
    ([avidbeam.com](https://www.avidbeam.com/avidbeam-demonstrates-ai-video-analytics-to-enhance-pilgrim-safety-at-hajj-conference-2025))
33. Retail | Secutel Physical Security Technology
    · Secutel markets SecuVue cloud people counting, queue monitoring, and heatmaps using connected cameras. ([secutel.co.za](https://secutel.co.za/retail_2025/))
34. Eluviant: AI Video Intelligence Platform
    · Eluviant presents its current AI Video Intelligence Platform; the page does not settle customer-specific module continuity or contracts. ([eluviant.com](https://www.eluviant.com/))
35. Syrate - Plateforme Africaine d'Intelligence Vidéo par IA Agentique
    · SYRATE SARL advertises ServEYE occupancy, queue, crowd-formation, and public-space applications. ([syrate.org](https://www.syrate.org/))
36. Rading Technologies - Enterprise Technology Solutions for Africa
    · Rading advertises crowd counting within emerging video-analytics and control-room services; a named application and paid deployment are not established.
    ([radingtechnologies.co.ke](https://www.radingtechnologies.co.ke/services))
37. Kipacha Technologies Limited
    · Kipacha advertises crowd-counting CCTV analytics within wider ICT services, not a separately established proprietary license. (kipacha.co.ke)
38. Projects - Knowledge Resources Africa
    · Knowledge Resources Africa reports crowd detection within an unnamed Nigerian public-space integration project; buyer and upstream software attribution remain unresolved.
    ([krafrica.com](https://krafrica.com/projects/))
39. AI Based Video Analytics | SEATech Systems
    · SEATech's Egyptian catalog represents i2V analytics, supporting a channel presence rather than confirmed local sales or manufacturer ownership.
    ([seatech-eg.com](https://www.seatech-eg.com/ai-based-video-analytics))
40. 随申行-大客流保障解决方案
    · The official Shanghai Suishenxing page describes multi-source passenger-flow monitoring, prediction, coordination, and a Hongqiao hub application.
    ([shmaas.cn](https://www.shmaas.cn/solution/massPassengerFlowSolution.html))
41. How Lauretta AI Turns Existing CCTV Into Operational Intelligence
    · Lauretta AI advertises existing-CCTV operational intelligence with crowd counts, density, movement, dashboards, and alerts; current contracts are not established.
    ([lauretta.io](https://lauretta.io/blog/existing-cctv-to-operational-intelligence-lauretta-ai))
42. AI Vision Analytics | V3 Smart Tech Malaysia
    · V3 Smart Tech's Malaysia-facing catalog advertises vision analytics including crowd counting and overcrowding detection. ([v3smarttech.my](https://v3smarttech.my/ai-vision-analytics/))
43. Intelligent Video Analytics & AI-Driven Solutions | Cylix
    · Cylix advertises integrated AI video analytics including crowd management; underlying product rights remain a separate question.
    ([cylix.ph](https://www.cylix.ph/integrated-technology-solutions/intelligent-video-analytics-ai-driven-solutions))
44. Crowd Management System - Solusi Cerdas Kelola Keramaian - GSI Indonesia
    · GSI Indonesia advertises crowd monitoring, dashboards, and alerts; its business article does not establish proprietary application ownership.
    ([gsi-indo.com](https://gsi-indo.com/2026/xx.xx/xx.xx/crowd-management-system-solusi-cerdas-kelola-keramaian/))

45. accesso - 2025 Full Year Results, 30 March 2026

· Evidence informing base-year company-share estimates: The official full-year presentation reports USD xx.xx of 2025 virtual-queuing revenue and a USD xx.xx 2024 comparator, separately from hardware and services. This replaces the seasonal proxy, not the frozen market denominator. ([accesso.com](https://accesso.com/wp-content/uploads/2026/xx.xx/FY2025_Results_Presentation_FinalC-xx.xx-xx.xx.pdf))

46. accesso Technology Group plc - Interim Results for the six months ended 30 June 2025

· Evidence informing base-year company-share estimates: The interim report identifies USD xx.xx of H1 2025 virtual-queuing revenue and describes transactional fee income, supporting the seasonality test and supplier-revenue boundary. It also records a revised major-customer agreement. ([accesso.com](https://www.accesso.com/assets/documents/accesso-H125-Results-RNS-FINAL.pdf))

47. accesso LoQueue Virtual Queuing System

· Evidence informing base-year company-share estimates: The commercial catalog distinguishes LoQueue reservation-led operational information from Qview physical-queue measurement. It supports product-scope attribution, not a second revenue increment or universal customer module coverage. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))

48. Pathfinder Partners

· Evidence informing base-year company-share estimates: The Pathfinder-branded partner page reports a footprint of more than xx.xx leading design firms. This is the model's company-specific commercial scale anchor, not an observed 2025 paying-firm census. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/partners/))

49. Pathfinder Pricing

· Evidence informing base-year company-share estimates: Current one-year Pathfinder prices are USD xx.xx node-locked and USD xx.xx floating, with qualifying multi-license discounts up to xx.xx% and included technical support. These support the annual price-equivalent model, not its assumed license mix or weighted discount. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/pricing/))

50. Video Analytics powered by AI - Ipsotek Ltd

· Evidence informing base-year company-share estimates: Ipsotek's current official footprint reports more than xx.xx completed projects in xx.xx countries. The estimate uses xx.xx only as a cumulative mixed-application activity reference, with explicit retrospective, crowd-attachment and billing adjustments. ([ipsotek.com](https://www.ipsotek.com/))

51. Ipsotek and UTI CFM awarded video analytics contracts for Romanian Airports: Cluj, Sibiu, and Satu Mare

· Evidence informing base-year company-share estimates: The Romanian-airport contract announcement reports more than xx.xx airport deployments and describes a broader analytics portfolio that includes crowd management. This supports the airport/non-airport model distinction but not annual crowd-software revenue or current billing status. ([ipsotek.com](https://www.ipsotek.com/ipsotek-and-uti-cfm-awarded-video-analytics-contracts-for-romanian-airports-cluj-sibiu-and-satu-mare/))

52. Our journey | Xovis

· Evidence informing base-year company-share estimates: Xovis describes more than xx.xx airport users and distinguishes airport software from sensors integrated into retail and building applications. This supports a modeled account footprint, not observed annual software revenue. ([xovis.com](https://www.xovis.com/company/our-journey?utm_source=openai))

53. Jacksonville Aviation Authority Awards Committee, April 28, 2025 - Xovis AERO Passenger Flow Management System

· Evidence informing base-year company-share estimates: Jacksonville's April 2025 award material identifies Xovis AERO annual renewal of USD xx.xx beginning May xx.xx 2025, and distinguishes it from the USD xx.xx five-year commitment. Used as a mixed-contract annual monetary anchor. ([flyjacksonville.com](https://www.flyjacksonville.com/award.pdf?ItemNumber=AC2025-xx.xx&pdfnumber=xx.xx))

54. Gentrack Group FY25 Investor Presentation - 24 November 2025

· Evidence informing base-year company-share estimates: The FY2025 Veovo chart separates approximately NZD xx.xx committed recurring revenue, NZD xx.xx other recurring revenue, NZD xx.xx projects and NZD xx.xx hardware. These constrain the modeled recurring-software numerator, not its crowd-specific allocation. ([gentrack.com](https://gentrack.com/wp-content/uploads/FY25-Investor-Presentation.pdf))

55. About Crowd Connected

· Evidence informing base-year company-share estimates: The company identifies xx.xx-plus deployments since 2022, xx.xx-plus venues and xx.xx-plus tracked delegates, and identifies Crowd Connected Ltd. These are cumulative activity and identity anchors, not annual paid-license observations. ([crowdconnected.com](https://www.crowdconnected.com/about/))

56. Attendee tracking | Real-time event attendance and session data

· Evidence informing base-year company-share estimates: The attendee-tracking offering reports two to three events weekly and describes separate tag-based session attendance activity. This constrains the annual event-equivalent model and qualifies an app-only interpretation of the entire portfolio. ([crowdconnected.com](https://www.crowdconnected.com/solutions/attendee-tracking/))

57. Crowd Connected Pricing

· Evidence informing base-year company-share estimates: Published offers include USD xx.xx plus USD xx.xx per tracked delegate, a USD xx.xx medium event-app package, USD 2,000 annual basic positioning and USD xx.xx/m² annual standard positioning. Hardware and other bundled obligations require modeled exclusion. Current prices are retrospective comparables. ([crowdconnected.com](https://www.crowdconnected.com/pricing/))

58. Crowd Connected Standard Terms and Conditions

· Evidence informing base-year company-share estimates: The 2026 terms establish prior-written-consent conditions for specified surveillance and critical-infrastructure uses. They support a contractual-access limitation, not a measured 2025 revenue deduction. ([crowdconnected.com](https://www.crowdconnected.com/legal/standard-terms-and-conditions.pdf))

59. About Copenhagen Optimization

· Evidence informing base-year company-share estimates: The company expressly places its Better Airport platform at more than xx.xx airports in 2025. This supports commercial account scale, not a virtual-queuing-only customer count or disclosed fee. ([copenhagenoptimization.com](https://copenhagenoptimization.com/company/about-us))

60. Port of Seattle Commission Agenda Memorandum - Passenger Flow Metrics Project, April 26, 2022

· Evidence informing base-year company-share estimates: Seattle's April 2022 proposal provides a USD xx.xx ten-year recurring budget. Annualization and the inherited assumed software fraction constrain a comparable USD xx.xx software fee; this is not Copenhagen Optimization revenue or an award to that company. ([meetings.portseattle.org](https://meetings.portseattle.org/portmeetings/attachments/2022/2022_04_26_RM_8b.pdf))

61. Retail Analytics Company | Who We Are | RetailNext

· Evidence informing base-year company-share estimates: Official company material references xx.xx proprietary sensor installations. This supports installed commercial scale but does not establish active 2025 software subscriptions or their realized fees. ([retailnext.net](https://retailnext.net/about/who-we-are))

62. RetailNext Unveils Traffic 3.0 for In-Store Analytics

· Evidence informing base-year company-share estimates: The January xx.xx 2025 Traffic xx.xx announcement explicitly includes occupancy monitoring and staffing functions alongside broader retail analytics. It supports base-year qualifying product availability and the need for scope attribution. ([retailnext.net](https://retailnext.net/about/press/retailnext-unveils-traffic-xx.xx-xx.xx))

63. Retail Analytics Pricing | RetailNext

· Evidence informing base-year company-share estimates: RetailNext's pricing description bundles hardware sensors, software licensing, warranty and other obligations. This supports excluding hardware and mixed services rather than treating a complete subscription as software-only revenue; no numerical tariff is inferred. ([retailnext.net](https://retailnext.net/pricing?utm_source=openai))

64. Partners - Frontlion

· Evidence informing base-year company-share estimates: The later Frontlion partner page describes deployment across thousands of locations. It supplies a current footprint category requiring an explicit retrospective paid-coverage bridge, not an exact 2025 location observation. ([frontlion.com](https://frontlion.com/partners/))

65. City of North Port - Qtrac Software Subscription Renewal Procurement Packet

· Evidence informing base-year company-share estimates: North Port's January 2025 Qtrac quotation identifies one location, a February 2025-January 2026 term and USD xx.xx annual software subscription, separately from SMS charges. This constrains software-only annual pricing, not company-wide recognized sales. ([content.govdelivery.com](https://content.govdelivery.com/attachments/FLNORTHPORT/2025/xx.xx/xx.xx/file_attachments/xx.xx/SS26-xx.xx%20Notice%20of%20Intent-%20QTRAC%20INC%20ADA%20COMPLETE%20PACKET.PDF?utm_source=openai))

66. Pasadena-Based Startup QLess Hits '100 Million Served' Milestone

· Evidence informing base-year company-share estimates: The October xx.xx 2017 company-issued announcement reports more than xx.xx QLess locations. This is a historical footprint anchor requiring explicit retention, addition and paying-status assumptions. ([prnewswire.com](https://www.prnewswire.com/news-releases/pasadena-based-startup-qless-hits-xx.xx-million-served-milestone-xx.xx.html))

67. Greater Orlando Aviation Authority Procurement Agenda - December 2, 2025

· Evidence informing base-year company-share estimates: The airport authority's 2025 procurement schedule identifies QLess and USD xx.xx for a one-year queuing, appointments and reporting software subscription. Used as a larger institutional-account price comparable, not a global average. ([assets.ctfassets.net](https://assets.ctfassets.net/qiecpoxp4bka/1JYtZ1WGN8te43z2goztqY/ea3f7f5d582eb2de52669c36fc75392b/Procurement-Agenda-xx.xx.pdf))

68. Kootenai County Board of Commissioners Minutes - October 28, 2025

· Evidence informing base-year company-share estimates: October xx.xx 2025 county minutes approve an annual QLess contract for the Sheriff's Driver's License Department. This independently supports continuing physical-service commercial participation, not global revenue or a paid-location count. ([kcgov.us](https://www.kcgov.us/AgendaCenter/ViewFile/Minutes/_10282025-xx.xx))

69. Xovis - Passenger Terminal Expo 2025 Press Release

· Evidence informing base-year company-share estimates: Xovis PTE 2025 material reports more than xx.xx installed sensors. It supports the larger gross-stock disclosure but does not reconcile the predecessor's smaller counting perimeter or establish paid software attachment. ([api.xovis.com](https://api.xovis.com/fileadmin/user_upload/data/press_media/Press_Release_PTE_2025_Final.pdf))

· Evidence informing base-year company-share estimates: The independently retrieved Xovis gross-stock disclosure challenges the inherited combined monitoring-stock calibration. It supports retaining denominator uncertainty, not altering RetailNext's own installation count or assigning Xovis hardware value to RetailNext. ([api.xovis.com](https://api.xovis.com/fileadmin/user_upload/data/press_media/Press_Release_PTE_2025_Final.pdf))

70. Exposants - Association des Bibliothécaires de France

· Evidence informing base-year company-share estimates: The 2025 exhibitor directory contains the supplier's claim of more than xx.xx equipped libraries, used as a conservative footprint proxy rather than an independently verified paid-license count. ([abf.asso.fr](https://abf.asso.fr/xx.xx/xx.xx/xx.xx/ABF/liste-des-exposants-2025))

71. Affluences : découvrez nos différentes offres

· Evidence informing base-year company-share estimates: Affluences separates SaaS flow-management access from counting hardware offered through purchase or rental, supporting the software-only attribution boundary, not the assumed fee levels. ([pro.affluences.com](https://www.pro.affluences.com/offres))

72. The Halo System - Halo Solutions

· Evidence informing base-year company-share estimates: The current platform description reports more than xx.xx locations. The model separately assumes its 2025 equivalent, qualifying crowd scope and paid proportion. ([halosolutions.com](https://www.halosolutions.com/the-halo-system/))

73. 5 easy packages to buy Halo for venues

· Evidence informing base-year company-share estimates: The public venue schedule lists free entry-level access and annual paid tiers of GBP xx.xx xx.xx xx.xx and xx.xx supporting the modeled price blend and explicit free-site deduction. ([assets.applytosupply.digitalmarketplace.service.gov.uk](https://assets.applytosupply.digitalmarketplace.service.gov.uk/g-cloud-xx.xx/documents/xx.xx/xx.xx-pricing-document-2024-xx.xx-xx.xx-xx.xx.pdf))

74. Halo partners with SSE Arena Belfast

· Evidence informing base-year company-share estimates: The February 2025 Belfast arena announcement describes a three-year agreement and initial use, supporting paid venue participation without disclosing contract value or completion of all planned expansion. ([halosolutions.com](https://www.halosolutions.com/halo-sse-arena/))

75. V-Count Launches Ultima AI: The Ultimate People Counting Sensor

· Evidence informing base-year company-share estimates: V-Count's December 2020 issuer release reports more than xx.xx installed sensors and xx.xx locations. The model uses the sensor figure as a historical gross-stock proxy, with explicit paid, scope and period limitations. ([einnews.com](https://www.einnews.com/pr_news/xx.xx/v-count-launches-ultima-ai-the-ultimate-people-counting-sensor))

76. People Counting Camera: 7 Retail Decisions | V-Count

· Evidence informing base-year company-share estimates: The company publishes software pricing of USD xx.xx-xx.xx per sensor monthly. USD xx.xx is the model's midpoint assumption, not a verified 2025 realized tariff. ([v-count.com](https://v-count.com/people-counting-camera-retail-decisions/))

77. Resellers - People Counting - V-Count

· Evidence informing base-year company-share estimates: The reseller program states subscription-license margins of up to xx.xx%, supporting a supplier-net discount allowance while not establishing the model's xx.xx% average realization. ([v-count.com](https://v-count.com/resellers/))

78. 20,000 箇所超に導入された VACAN の技術基盤を活用し、AI トランスフォーメーションに特化した子会社「VACAN Technologies」を設立

· Evidence informing base-year company-share estimates: The 2026 issuer announcement reports more than xx.xx VACAN deployment locations. This supports only a later gross commercial footprint; the period, paid-capture and annual-equivalent adjustments are modeled. ([prtimes.jp](https://prtimes.jp/main/html/rd/p/xx.xx.html))

79. トイレ混雑抑止サービス「AirKnock」｜VACAN（バカン）

· Evidence informing base-year company-share estimates: AirKnock's advertising-funded offer can carry no initial or monthly customer fee, providing material counterevidence to monetizing every deployment as paid software. Advertising receipts are excluded. ([corp.vacan.com](https://corp.vacan.com/throne-airknock/))

80. スマホ 1 つで、利用者の快適性向上を実現！順番待ち予約サービス「VACAN Q ticket」 スマホ完結プランを提供開始

· Evidence informing base-year company-share estimates: The issuer's smartphone Q ticket announcement lists JPY xx.xx per day with no initial fee. It constrains a software price comparison but does not establish the modeled JPY xx.xx monthly recurring realization. ([prtimes.jp](https://prtimes.jp/main/html/rd/p/xx.xx.html))

81. Qmatic Welcomes New CEO and Vice CEO

· Evidence informing base-year company-share estimates: The January xx.xx 2025 company announcement reports more than xx.xx systems across more than xx.xx countries. It anchors commercial scale, not the assumed active paid fraction or legacy-modern software mix. ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-new-ceo-and-vice-ceo))

82. About Wavetec, The Technology Company

· Evidence informing base-year company-share estimates: The company profile reports more than xx.xx customer-experience installations and distinguishes queue systems, kiosks and displays. These broader counts support the gross-stock proxy and the need for scope and paid-software deductions. ([wavetec.com](https://www.wavetec.com/about-us/))

83. Federal Reserve Board - Foreign Exchange Rates - G.5A - January 05, 2026

· Evidence informing base-year company-share estimates: The official 2025 annual exchange-rate table is the currency-period comparator; Halo's USD xx.xx/GBP conversion is an intentionally rounded working assumption rather than an exact quoted rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/current/))

· Evidence informing base-year company-share estimates: The official 2025 annual exchange-rate table is the currency-period comparator; VACAN's JPY xx.xx/USD conversion is an intentionally rounded working assumption rather than an exact quoted rate. ([federalreserve.gov](https://www.federalreserve.gov/releases/g5a/current/))

18.2. Market Concentration Analysis, 2025

[illegible] Buyers can preserve choice by naming both the required application rights and the party responsible for interface support. Platform breadth alone does not establish exclusive access to the account.

Device-linked portfolios create a different source of bargaining influence. Axis Communications supplies Object Analytics through compatible devices. [illegible] Keenfinity lists Intelligent Insights, but exact present licensing, fulfillment, and jurisdiction-specific contracting remain unsettled. Buyers should establish who controls the rights and obligations relevant to the proposed order before treating these identities as independent alternatives.

[illegible]

[illegible] Otherwise, the bundle relocates coordination rather than eliminating it. Entrants should not assume that supplying one complementary component grants control of the end-customer relationship.

Switching leverage is specific to what the buyer can retain. Tapp's Public Eye record describes both open-source software and subscription access, while CityTraffic offers platform access to measured mobility information. [illegible]

Specialist observation routes create additional information and delivery dependencies. puremat ic markets pure. [illegible]

[illegible] Extending an established relationship can preserve familiar counterparties only when the required crowd function, compatible estate, entitlement, and support party are explicit. A separately supported crowd application remains an alternative where extension would introduce unsuitable scope or leave the operating commitment divided.

Sources & Evidence

1. Partners | WaitTime
   · WaitTime identifies TD SYNNEX distribution for supporting hardware and services. This establishes complementary commercial relationships rather than universal transfer of application, equipment, or interface obligations. ([thewaittimes.com](https://www.thewaittimes.com/partners))
2. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
   · Cisco's December xx.xx 2022 announcement reports WaitTime at the Etihad Stadium using Cisco infrastructure and Meraki cameras. The historical relationship does not establish one participant's responsibility for the complete customer commitment. ([newsroom.cisco.com](https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2022/m12/manchester-city-collaborates-with-cisco-to-deploy-crowd-intelligence-solution-waittime.html))
3. BriefCam Frequently Asked Questions
   · BriefCam's FAQ distinguishes product variants and expandable user, camera-channel, and real-time response entitlements. These are application-specific rights rather than a portfolio-wide entitlement. ([milestonesys.com](https://www.milestonesys.com/products/briefcam-faq/))
4. Products
   · Awiros describes AppStack as an application-selection and purchasing platform supported by a developer ecosystem. This establishes a platform-and-application commercial relationship, not identical rights across applications. ([awiros.com](https://awiros.com/products))
5. With the acquisition of Videtics, Technis lays the foundation stone for a sovereign European group in AI applied to physical spaces
   · Technis's acquisition announcement establishes an ownership and portfolio relationship with Videtics. It does not establish separately contracting, nonoverlapping competitive supply. ([xx.xx.fs1.hubspotusercontent-eu1.net](https://xx.xx.fs1.hubspotusercontent-eu1.net/hubfs/xx.xx/ENG_19_02_Technis%xx.xx-%20Videtics%20UK%20US%20def.pdf))
6. Videtics platform
   · Technis presents Videtics as a platform within its portfolio. Continued product branding does not itself establish an independent supplier relationship. ([technis.com](https://www.technis.com/en/videtics-platform))
7. In just twelve months, we have built real momentum. | Keenfinity Group
   · Keenfinity identifies July xx.xx 2025 as its independence date following separation from Bosch Group. This establishes corporate separation, not every product's present licensor or support allocation. ([keenfinity-group.com](https://www.keenfinity-group.com/xc/en/news/press-room/in-just-twelve-months-we-have-built-real-momentum/))
8. KEENFINITY Group | Intelligent Insights Base | IGI-BASE
   · Keenfinity's catalog identifies Intelligent Insights Base. The listing does not settle jurisdiction-specific contracting, fulfillment, or continuing customer obligations. ([commerce.keenfinity.tech](https://commerce.keenfinity.tech/xl/en/Intelligent-Insights-Base/p/F.01U.xx.xx/))
9. pure.AIS - purematic
   · purematic markets pure.AIS for attraction visitor flow, occupancy, and waiting information, with operational and guest-facing applications and API integrations. These are advertised functions, not demonstrated buyer outcomes. ([purematic.com](https://www.purematic.com/en/solutions/crowd-control/))
10. How does it work - Crowdscan
    · CrowdScan advertises sensor-linked density counting, analytics, prediction, and integrated-management services with cloud processing. Its described observation route does not require cameras or visitors' mobile devices; deployment-wide privacy and compatibility are not independently established. ([crowdscan.be](https://www.crowdscan.be/how-does-it-work/))
11. Business Intelligence, Insights and Video Analytics | March Networks
    · March Networks markets Searchlight Cloud with video-based queue information, dashboards, occupancy-related alerts, and connected business information. These offering declarations do not establish complete crowd coverage or realized operating benefits. ([marchnetworks.com](https://www.marchnetworks.com/solutions/business-intelligence/))

12. AXIS Object Analytics | Axis Communications
· Axis markets Object Analytics through supported Axis devices and describes integration with video-management systems. Device compatibility and software integration remain distinct purchasing questions. ([axis.com](https://www.axis.com/products/axis-object-analytics))
13. DSS Professional Datasheet
· Dahua's DSS Professional datasheet describes people-counting and related information functions within a broader security-management package. The specification does not establish universal device or application interchangeability. ([software.dahuasecurity.com](https://software.dahuasecurity.com/DSSDesignTool/static/media/DSS%20Pro%xx.xx.0_Datasheet.ff06d565.pdf))
14. HikCentral Professional AE Specification
· The HikCentral Professional AE specification documents a broader security-platform package. It does not independently establish the entitlements or continuing support in a proposed customer order. ([pinfo.hikvision.com](https://pinfo.hikvision.com/hkwsen/unzip/20221117155452_63455_doc/pdf.pdf))
15. Occupancy Monitoring - Cloud-Based - Cisco Spaces
· Cisco markets its own Spaces occupancy-monitoring proposition using an existing network relationship. This is distinct from its infrastructure role in the documented WaitTime deployment. ([spaces.cisco.com](https://spaces.cisco.com/occupancy-monitoring/))
16. Crowd Analytics and Management Technology | Verizon
· Verizon describes Crowd Analytics as SaaS combining applications and devices with professional and support services. The advertised combination does not establish a particular customer's responsibility allocation. ([verizon.com](https://www.verizon.com/business/products/5g-edge/crowd-analytics/))
17. Public Eye - Open Source Crowd Management Solution - Tapp
· Tapp describes Public Eye as an open-source crowd-management solution and separately advertises subscription dashboard access. Software availability and a continuing hosted service are different commercial commitments. ([tapp.nl](https://www.tapp.nl/project-overview/public-eye))
18. How do we measure | CityTraffic
· CityTraffic describes subscription access to measured mobility information through its platform. Access to that information does not itself transfer the underlying measurement relationship. ([citytraffic.nl](https://citytraffic.nl/how-do-we-measure/))
19. Artificial intelligence makes stadiums smarter
· Dallmeier's October xx.xx 2025 stadium article describes Panomera monitoring combined with AI within its stadium-system proposition. The supplier account does not establish suitability or customer-specific obligations for another stadium. ([dallmeier.com](https://www.dallmeier.com/about-us/dallmeier-blog/artificial-intelligence-makes-stadiums-smarter))
20. Pricing - Actuate
· Actuate lists crowd analytics within its subscription offering and directs buyers to security-system integrators or the company. Package selection and integrator engagement do not independently settle the customer's licensed functions and delivery obligations. ([actuate.ai](https://actuate.ai/pricing/))
21. Video analytics - Cathexis
· Cathexis describes CathexisVision queue-length analysis, entry-and-exit counting, occupancy applications, and notifications within its video-analytics suite. These functions do not establish the rights or support obligations in every installation. ([cathexisvideo.com](https://cathexisvideo.com/video-management-software/video-analytics/))

18.3. Recent Developments & Impact Analysis, 2025

Portfolio combinations have changed the ownership of some competitive alternatives without automatically combining customer entitlements. Milestone Systems' March xx.xx 2025 account reports its acquisition of BriefCam and Arcules during 2024. ■■■■■■■ ■■ ■■■■■■■■■ ■■■

[illegible]

Supplier separation creates the opposite attribution risk. [illegible] Buyers relying on transferred or acquired portfolios should obtain the actual seller, application rights, and support commitment before treating the corporate event as continuity assurance.

[illegible] These are support deadlines, not immediate shutdowns or retirement of the entire Qmatic portfolio. Affected institutions should compare the supported successor with replacement offers before their applicable deadline, including migration acceptance and connected-system obligations.

New delivery relationships can widen the practical choice set, but their status matters. [illegible] Buyers should monitor signed delivery scope and accepted service commitments before relying on these arrangements as substitutes for an established application contract.

[illegible] This adds a relevant announced stadium engagement to the comparison, but does not establish continuing operating status, every licensed function, or transferability to another venue. A venue considering that route should require confirmation of the live commercial scope and accountable support party rather than extrapolate from the announcement.

Sources & Evidence

1. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   · The new Swiss partner relationship changes the advertised delivery route without establishing customer-specific service levels.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))
2. End of Life Announcement: Qmatic Show
   · Qmatic's October xx.xx 2026 notice schedules Show support and security-patch cessation for October xx.xx 2027, permits continued operation, and flags possible hardware changes.
   ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-qmatic-show))
3. New beginnings for Milestone
   · Milestone's March xx.xx 2025 article reports its acquisition of BriefCam and Arcules during 2024, not automatic combined customer entitlements.
   ([milestonesys.com](https://www.milestonesys.com/articles/new-beginnings-for-milestone/))
4. Peek Acquires ACME Ticketing and Connect&GO
   · Peek's November xx.xx 2025 announcement reports acquiring Connect&GO and an intention to combine capabilities, not completed contract migration.
   ([peekpro.com](https://www.peekpro.com/blog/peek-acquires-acme-connect-go-raises-70m))
5. End of Life Announcement for Qmatic Orchestra 6
   · Qmatic's June xx.xx 2026 notice schedules Orchestra xx.xx support, updates, maintenance, and bug fixes to end July xx.xx 2027.
   ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-for-qmatic-orchestra-xx.xx))
6. With the acquisition of Videtics, Technis lays the foundation stone for a sovereign European group in AI applied to physical spaces
   · The completed acquisition announcement describes integrating Videtics' video-analysis and flow capabilities; it does not establish combined customer entitlements.
   ([xx.xx.fs1.hubspotusercontent-eu1.net](https://xx.xx.fs1.hubspotusercontent-eu1.net/hubfs/xx.xx/ENG_19_02_Technis%xx.xx-%20Videtics%20UK%20US%20def.pdf))
7. Videtics platform
   · The Videtics platform page corroborates portfolio integration following the acquisition.
   ([technis.com](https://www.technis.com/en/videtics-platform))
8. In just twelve months, we have built real momentum. | Keenfinity Group
   · The supplier separation changes attribution of the transferred portfolio without identifying every product's current contracting entity.
   ([keenfinity-group.com](https://www.keenfinity-group.com/xc/en/news/press-room/in-just-twelve-months-we-have-built-real-momentum/))
9. KEENFINITY Group | Intelligent Insights Base | IGI-BASE
   · The continuing product listing supports portfolio attribution, not automatic support or contract continuity after separation.
   ([commerce.keenfinity.tech](https://commerce.keenfinity.tech/xl/en/Intelligent-Insights-Base/p/F.01U.xx.xx/))
10. BigBear.ai Completes Pangiam Acquisition
    · BigBear.ai announced completion of its Pangiam acquisition on March xx.xx 2024; continuing crowd-specific availability is not established.
    ([bigbear.ai](https://bigbear.ai/newsroom/bigbear-ai-completes-pangiam-acquisition/))
11. ADNEC Group partners with Presight to implement AI-Powered Smart Venue Management
    · Presight's March xx.xx 2026 ADNEC memorandum proposes Intelli-based visitor management and crowd monitoring, not completed implementation.
    ([presight.ai](https://www.presight.ai/news/adnec-group-partners-with-presight-to-implement-pioneering-ai-powered-smart-venue-management-within-its-operations))

12. Digita, CoreGo and Nokia pioneer private 5G solutions to enhance connectivity and safety at major events
    · Digita's February xx.xx 2026 collaboration with CoreGo and Nokia concerns event connectivity, operational information, and situational visibility, not separate crowd-software entitlements for every participant. ([digita.fi](https://www.digita.fi/en/tiedotteet/digita-corego-and-nokia-pioneer-private-5g-solutions-to-enhance-connectivity-and-safety-at-major-events/))
13. How Staqu's Jarvis is securing RCB's home ground for crowd control - BusinessToday
    · The March xx.xx 2026 report records a Staqu-RCB engagement involving JARVIS crowd analytics; it does not establish subsequent operating continuity. ([businesstoday.in](https://www.businesstoday.in/amp/technology/story/how-staqus-jarvis-is-securing-rcbs-home-ground-for-crowd-control-xx.xx-2026-xx.xx-xx.xx))

18.4. Product Portfolio Analysis, 2025

[illegible] Savannah Simulations AG maintains a SimWalk contact route, but that undated record does not settle continuing paid supply. Planning buyers should compare the entitlement, supported design connections, revision rights, and responsibility for the project deliverable-not assume that installation or a common simulation label establishes equivalence.

Purchasing a planning deliverable is also different from acquiring software rights. [illegible] A buyer needing repeated internal revisions should establish continuing application access and file responsibilities; a bounded advisory engagement may be more suitable when the required purchase is an accountable planning deliverable.

Video-management portfolios provide another purchasing route. Milestone Systems markets BriefCam variants that distinguish retrospective review from live response and research functions. [illegible]

Specialist video portfolios overlap on monitoring but differ in their advertised buyer context. Ipsotek Ltd combines crowd counts, queues, heatmaps, and reporting; Evitech's Lynx focuses on video-based crowd management.

SITA's Passenger Intelligent Insights, NEC Corporation's Congestion Management Solution, TAV Technologies' passenger-flow services, Isarsoft's transport analytics, and Ariadne Maps GmbH's airport analytics provide additional commercial approaches. Airports should select broader operating scope only where connected-system owners can support it; a managed measurement package and an airport operating platform answer different responsibility questions.

These offerings can inform journey or public-space decisions, but their observation channels and delivery models should not be equated with complete live venue occupancy. Buyers need to distinguish application access, analytical deliverables, and rights to reuse the resulting information.

Queue portfolios should be grouped by the service being allocated. Qmatic, Qtrac, Inc. through Frontlion, QLess, and Wavetec address physical service queues, remote waiting, and visitor communications.

[illegible]

Restaurant, attraction, and airport queues create different portfolio requirements. [illegible] These are not interchangeable substitutes for an institutional queue application or an airport-wide monitoring contract.

[illegible] GInIEm's tPass and EntryLog address ticketing or guest arrivals, while EEX and ADDtix advertise broader event access and crowd functions. Buyers should specify whether the purchase controls admission inventory, records entry, reconciles presence, or observes activity beyond controlled gates.

[illegible] Crowdcom B.V.'s ShowTwin adds a live visual layer over its Event Dashboard, and ST Engineering's AGIL Digital Twin places crowd and queue information within a spatial operating platform. Visitor publication, operational visualization, and staff coordination remain distinct commitments even when presented together.

European analytics alternatives also differ in how crowd functions sit inside the wider application. [illegible]

[illegible] Comparable procurement requires the named module and delivery responsibility, rather than treating these surrounding platforms as identical crowd suites.

Asia-Pacific portfolios provide additional combinations of observation and operating context. [illegible] Buyers should preserve the distinction between a documented application, its supporting information source, and the party committing to continuing delivery.

Sources & Evidence

1. LEGION | Bentley Systems
   - LEGION is offered for pre-implementation pedestrian planning through a subscription and separately described expert-service options. ([bentley.com](https://www.bentley.com/products/legion/))
2. Daily Operations - Halo Solutions
   - Halo markets shared incidents, tasks, mobile reports, cross-team transfers, and operational oversight. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))
3. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   - Crowd Connected describes app-derived heatmaps, dwell, flow, dashboards, APIs, and exports. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
4. MassMotion | pedestrian simulation and crowd modelling software
   - Oasys markets MassMotion for pedestrian simulation, design assessment, operating scenarios, and BIM-linked workflows. ([oasys-software.com](https://www.oasys-software.com/products/pedestrian-simulation-software/massmotion/))
5. BriefCam video analytics software | Milestone Systems
   - Milestone's BriefCam catalog distinguishes review-focused variants from broader response and research capabilities. ([milestonesys.com](https://www.milestonesys.com/products/briefcam))
6. Airport Operations Software | Intelligent Airport Platform | Veovo
   - Veovo combines flow, queue, forecasting, and resource-related functions in its airport platform. ([veovo.com](https://veovo.com/airports))
7. accesso LoQueue Virtual Queuing System | accesso
   - accesso separates LoQueue attraction reservations and dashboards from Qview physical-queue observation. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
8. Software - accu:rate
   - accu:rate offers configurable crowd:it license scope and identifies Vectorworks and Revit connections. ([accu-rate.de](https://www.accu-rate.de/en/software/))
9. Attraction & Theme Parks | Connect&GO
   - Connect&GO markets modular attraction ticketing, admission, capacity, staffing, and operational information. ([connectngo.com](https://www.connectngo.com/solutions/attraction-park))

10. Nommon | Population Insights
    - Nommon offers Population Insights through API access or bespoke projects, with differing information-reuse licenses. ([nommon.es](https://www.nommon.es/products/population-insights/))
11. Affluences : découvrez nos différentes offres
    - Affluences separates licensed SaaS access from counting hardware offered through purchase or rental. ([pro.affluences.com](https://www.pro.affluences.com/offres))
12. Solution de comptage et réservation pour bibliothèque Affluences
    - Affluences advertises library reservations and crowd-information publication alongside occupancy applications. ([pro.affluences.com](https://www.pro.affluences.com/bibliotheques-mediatheques))
13. Platform: Infrastructure Intelligence | Outsight
    - Outsight advertises spatial analytics, occupancy, queues, interfaces, and sensing-related project support. ([outsight.ai](https://www.outsight.ai/platform/))
14. VACAN - Real-time Crowd Visualization & Digital Signage Platform, Japan
    - VACAN describes crowd information distributed through signage, maps, smartphones, and mobile queuing. ([corp.vacan.com](https://corp.vacan.com/signage/en/))
15. Visitor Management System - Qmatic
    - Qmatic advertises visitor-number controls, appointments, check-in, signage, and remote waiting. ([qmatic.com](https://www.qmatic.com/solutions/visitor-management-system))
16. Pedestrian simulation software PTV Viswalk
    - PTV markets Viswalk pedestrian simulation and describes applications connected with wider transport simulation. ([ptvgroup.com](https://www.ptvgroup.com/en-us/products/pedestrian-simulation-software-ptv-viswalk))
17. Pathfinder | Crowd Movement Simulation and Egress Software
    - Thunderhead markets Pathfinder for crowd movement, pedestrian circulation, and egress planning with commercial purchase and evaluation routes. ([thunderheadeng.com](https://www.thunderheadeng.com/pathfinder/))
18. Pedestrian Library - AnyLogic Simulation Software
    - AnyLogic offers a Pedestrian Library within its broader simulation environment and provides a quotation route. ([anylogic.com](https://www.anylogic.com/features/libraries/pedestrian-library/))
19. Partner Program Pedestrian Dynamics - Service Partners
    - InControl's Pedestrian Dynamics service-partner document describes external license sales and associated partner arrangements; current terms are not established. ([support.incontrolsim.com](https://support.incontrolsim.com/en/pd-purchase/xx.xx-pd-service-partner/download.html))
20. SimCrowds
    - uCrowds B.V. advertises monthly SimCrowds subscriptions and an offline-use option. ([ucrowds.com](https://ucrowds.com/simcrowds/))
21. SIMWALK - Pedestrian Simulation for Transport, Aviation and Architecture
    - The undated SimWalk contact page attributes the business to Savannah Simulations AG but does not establish continuing paid fulfillment. ([simwalk.com](https://simwalk.com/contact.html))
22. Architecture | Mott MacDonald
    - Mott MacDonald describes STEPS as a pedestrian-simulation tool within its architecture services, not an external license offer. ([mottmac.com](https://www.mottmac.com/en-us/markets-and-services/engineering/architecture/))
23. Crowd Dynamics | Crowd Modelling and Simulation | LEGION
    - Crowd Dynamics describes in-house Myriad X modeling capability within its crowd-modeling service. ([crowddynamics.com](https://www.crowddynamics.com/crowd-modelling))
24. Movement Strategies | Advisory | GHD
    - GHD identifies SENSE as in-house pedestrian-modeling software in its Movement Strategies advisory offering. ([ghd.com](https://www.ghd.com/en-gb/expertise/advisory/movement-strategies))

25. Security Planning in OnePlan - OnePlan Events
    - OnePlan advertises shared security plans, controlled plan access, security zones, and capacity-planning functions. ([oneplan.io](https://www.oneplan.io/security-planning/))
26. SimTread 2026｜無償提供プラグイン
    - The Japanese Vectorworks catalog presents SimTread as a pedestrian and crowd-flow simulation add-on for qualifying customers. ([vectorworks.co.jp](https://www.vectorworks.co.jp/ct/pages/pdl/2026/simtread2026.html))
27. Crowd estimation: Keeping count with video analytics
    - Genetec describes crowd estimation as part of Security Center, including notifications, dashboards, and historical information. ([genetec.com](https://www.genetec.com/blog/products/crowd-estimation-keeping-count-with-video-analytics))
28. Video Analytics Software & Solutions | AI-Powered Platform
    - Motorola Solutions' Avigilon portfolio includes crowd detection and occupancy-management functions. ([avigilon.com](https://www.avigilon.com/analytics))
29. Crowd Detection - Occupancy Detection - Senstar
    - Senstar markets Symphony Crowd Detection for occupancy estimation, overcrowding identification, and notifications. ([senstar.com](https://senstar.com/products/video-analytics/crowd-detection/))
30. AI people counting software for real-time crowd monitoring
    - AxxonSoft markets Crowd Estimation within Axxon One for crowd monitoring and alerts. ([axxonsoft.com](https://www.axxonsoft.com/ai-video-analytics/video-content-analytics/crowd-estimation))
31. SecurOS Tracking Kit - One Solution, 10 Detectors
    - ISS lists Crowd Detector within SecurOS Tracking Kit and describes separate or packaged supply. ([issivs.com](https://issivs.com/wp-content/uploads/2023/xx.xx/SecurOS_TrackingKit_Datasheet_v.xx.xx.4_EN.pdf))
32. Crowd Density Video Analytics
    - intuVision places Crowd Density in the intuVision VA Security module. ([intuvisiontech.com](https://www.intuvisiontech.com/events/crowd-density))
33. Crowd Management - Ipsotek Ltd
    - Ipsotek advertises crowd counting, overcrowding, heatmaps, queues, and reporting for public spaces and venues. ([ipsotek.com](https://www.ipsotek.com/solutions/crowd-management/))
34. Evitech - Vidéo surveillance intelligente - Lynx
    - Evitech markets Lynx as video-content-analysis software for crowd management, alerts, and statistics. ([evitech.com](https://www.evitech.com/en/products/lynx-en))
35. AI Video Analytics for Hospitality Security and Operations
    - Videonetics advertises hospitality occupancy, queue, movement, and crowd-safety analytics. ([videonetics.com](https://www.videonetics.com/hospitality))
36. Traffic Flow Analysis | Scylla
    - Scylla markets Traffic Flow Analysis with occupancy, people-counting, crowd, and queue functions. ([scylla.ai](https://www.scylla.ai/traffic-flow-analysis/))
37. Vaidio for Stadiums
    - Vaidio's stadium proposition includes live occupancy, crowd direction, concession queues, and staffing-related information. ([vaidio.ai](https://www.vaidio.ai/solutions/stadiums))
38. Video Analytics Solution - AllGoVision.com
    - AllGoVision markets crowd management within its broader commercial video-analytics software portfolio. ([allgovision.com](https://www.allgovision.com/allgovision-analytics.php))
39. Airport software | Xovis
    - Xovis markets AERO as a managed passenger-flow package combining sensors, software, implementation, training, and support. ([xovis.com](https://www.xovis.com/technology/airport-software))

40. Optimising Passenger Flow at Aberdeen International Airport with Beonic's AI-Powered Insights & LiDAR
    - Beonic's Aberdeen account describes its platform using LiDAR-linked information for passenger flow, queues, occupancy, and congestion. ([beonic.com](https://www.beonic.com/blog/optimising-passenger-flow-aberdeen-international-airport?hs_amp=true))
41. SITA | SITA Passenger Intelligent Insights
    - SITA markets Passenger Intelligent Insights for passenger movement, dwell, touchpoint performance, and bottleneck analysis. ([sita.aero](https://www.sita.aero/solutions/sita-at-airports/sita-passenger-processing/sita-passenger-intelligent-journey/sita-passenger-intelligent-insights/))
42. Airport Terminal Operations: Aviation | NEC
    - NEC's airport catalog names a Congestion Management Solution for real-time density, pedestrian-flow information, and alerts. ([nec.com](https://www.nec.com/en/global/solutions/safety/aviation/airportoperation/index.html?nid=aviation_top_2507_2))
43. Services | TAV Technologies
    - TAV Technologies advertises passenger-flow monitoring, congestion identification, and prediction within airport services. ([tavtechnologies.aero](https://tavtechnologies.aero/services))
44. Video Analytics for Transport Operators | Isarsoft Perception
    - Isarsoft markets Perception for public-transport passenger counting, crowd management, and flow analysis. ([isarsoft.com](https://www.isarsoft.com/solutions/industry/public-transport))
45. Airport Passenger Analytics and Passenger Flow | Ariadne
    - Ariadne markets airport passenger analytics and passenger-flow applications. ([ariadne.inc](https://www.ariadne.inc/industries/airports/))
46. Stadium WiFi Marketing and Data Analytics Solution
    - Aislelabs advertises stadium visit, dwell, and movement analytics within a Wi-Fi-oriented proposition. ([aislelabs.com](https://www.aislelabs.com/industries/stadiums/))
47. NFL Draft - Meshh
    - Meshh reports event-zone movement, arrivals, and dwell analysis for the NFL Draft. ([meshh.com](https://www.meshh.com/case_studies/nfl-draft/))
48. コンプレノ | 株式会社 Agoop
    - Agoop markets Kompreno as browser-based people-flow visualization and analysis for Japanese locations and planning applications. ([agoop.co.jp](https://agoop.co.jp/service/kompreno/))
49. 人流解析システム SafeFlow｜株式会社アスペリア
    - 株式会社アスペリア describes SafeFlow people-flow and density analysis for event planning; separate external licensing is not established. ([asperia.jp](https://www.asperia.jp/product/safeflow/))
50. Queue Management Software | Frontlion
    - Frontlion offers remote waiting and visitor communications and identifies itself as a brand of Qtrac, Inc. ([frontlion.com](https://frontlion.com/platform/queue-management/))
51. Upgrade Your Shooting Range Scheduling System Post-COVID - Queue Management Systems by QLess
    - QLess markets virtual queues and appointments for physical facilities, including remote waiting and communications. ([qless.com](https://www.qless.com/upgrade-your-shooting-range-scheduling-system-post-covid/))
52. Wavetec's Toolkit for Black Friday Crowd Management
    - Wavetec's commercial article offers its Queue Management System for physical retail customer flow. ([wavetec.com](https://www.wavetec.com/blog/wavetec-toolkit-for-black-friday-crowd-management/))
53. Software de gestión de filas en tiempo real
    - ZeroQ combines branch operations, virtual tickets, notifications, and real-time analytics. ([zeroq.co](https://zeroq.co/suite-zeroq/))

54. Gestión de filas: Reduce tiempos de espera y optimiza turnos en sucursales | Numia
    · Numia markets physical-service queue organization, multichannel registration, prioritization, appointments, and branch dashboards. ([numia.co](https://numia.co/es/soluciones/gestion-de-filas))
55. Gestión de Filas - Soluciones - Sidesys IT Solutions
    · Sidesys' commercial e-Flow description covers physical service queues, mobile access, notifications, and reporting. ([sidesys.com](https://sidesys.com/gestion-de-filas-soluciones/))
56. Fila Fácil | Itchat Brasil
    · Itchat Brasil markets Fila Fácil for digital queues and reducing physical waiting concentrations. ([itchatbrasil.com](https://www.itchatbrasil.com/filafacil))
57. Filazero | Sistema de gestão de filas com previsão em tempo real
    · Filazero advertises queue management, waiting predictions, and channels allowing customers to wait away from the physical queue. (filazero.net)
58. Qanty | Software de Agendamento e Gestão de Filas
    · Qanty advertises cloud queue management with physical tickets, virtual waiting, notifications, and dashboards. ([proteccion.qanty.com](https://proteccion.qanty.com/pt/))
59. Queue Management System & Appointment Software | Skiplino
    · Skiplino markets queue-management and appointment software; the catalog does not settle a customer-specific operating commitment. (skiplino.com)
60. Qme Solutions
    · Qme Solutions advertises joining physical service queues before arrival and branch-flow management. (qme.solutions)
61. Lista de espera y bitácora digital para restaurantes, bares y antros | JOINLIST
    · JOINLIST markets waiting lists, restaurant and bar administration, and customer table-readiness messages. (joinlist.com.mx)
62. Get In - Soluções Get In: controle de reservas online, filas e marketing
    · Get In advertises restaurant reservations, remote queue entry, SMS progress, and operating reports. ([restaurante.getin.app](https://restaurante.getin.app/solucoes-get-in/))
63. Better Virtual Queuing: Improve the Passenger Experience
    · Copenhagen Optimization markets Better Virtual Queuing for booked airport arrival slots and touchpoint access.
    ([copenhagenoptimization.com](https://copenhagenoptimization.com/better-airport/better-virtual-queuing))
64. CLEAR Mobile - Predictable Airport Security | CLEAR
    · CLEAR Mobile is advertised as a passenger-facing airport-lane service without a required specific arrival time. ([clearme.com](https://www.clearme.com/clear-mobile))
65. CLEAR Mobile Terms | CLEAR
    · CLEAR Mobile's terms describe virtual-queuing services rather than establishing a standalone airport software entitlement. ([clearme.com](https://www.clearme.com/clear-mobile-terms))
66. Sports | Optimize Event Flow - Learn More - Intellitix
    · Intellitix advertises conditional event-zone access and entry-activity reporting. ([intellitix.com](https://www.intellitix.com/sports))
67. Ensure everyone is where they're supposed to be with Howler's RFID access control solution
    · Howler describes RFID zone permissions and live access-movement reporting, not unrestricted spatial observation. ([organisers.howler.events](https://organisers.howler.events/features/access_control))
68. Configuring Capacity Management, Holds & Pass Required Tickets | Gateway Ticketing Systems
    · Gateway's historical Galaxy material identifies capacity-management functions without establishing current live-flow scope.
    ([gatewayticketing.com](https://www.gatewayticketing.com/resources/tuesdaytalks-on-may-xx.xx-2020-configuring-your-timed-entry-event/))

69. Digital Event Ticketing in Morocco | E-Ticket Pro - Somayar
    - Somayar's E-Ticket Pro describes entrance activity and attendance-flow reporting for Moroccan events. ([somayar.ma](https://somayar.ma/en/digital-ticketing-festival-event-morocco/))
70. Software para negocios turísticos - Niveway
    - Niveway advertises attraction ticket validation and real-time capacity-control functions within tourism software. ([niveway.com](https://niveway.com/soluciones))
71. Dingo AI Solutions - Control de Acceso Inteligente · Costa Rica
    - Dingo AI Solutions advertises club access and capacity functions combined with supporting hardware and services. (dingosolutions.io)
72. Software de gestión para boliches y discotecas | Noctra Argentina
    - Noctra advertises nightclub entry administration and live occupancy views; demonstration material does not establish customer adoption. (noctraarg.com)
73. tPass: Sistema de venta de Tickets online - GInIEm
    - GInIEm identifies tPass as its online event-ticketing system; broader crowd functions are not established by this record. ([giniem.com](https://giniem.com/servicios/sistema-de-venta-de-tickets-online/))
74. EntryLog - Effortless Guest List Management
    - EntryLog advertises guest-list administration, live attendance, and arrival or entrance analytics. ([entrylog.eu](https://www.entrylog.eu/))
75. The Event Operating System | EEX
    - EEX advertises exhibition-hall access control and crowd-density monitoring within an event platform. (eexindo.com)
76. ADDtix Malaysia | Event Ticketing & Crowd Management
    - ADDtix's Malaysia-facing catalog advertises event capacity control and physical entry-queue management. ([addtix.my](https://www.addtix.my/))
77. Crowdmanagement Nijmegen LED displays events | Daylight
    - Daylight describes scenario software, displays, and an event control-room arrangement, with decision authority retained by policy makers. ([crowdmanagement.com](https://crowdmanagement.com/en/cities/nijmegen/))
78. AI 混雑可視化システム「イマコミ」
    - Imakomi advertises congestion and queue visualization, with Shobunsha Holdings identified as an inquiry contact rather than a settled licensor. ([next.mapple.co.jp](https://next.mapple.co.jp/imakomi))
79. Crowd Analytics & People Counting for Events | CrowdSense
    - CrowdSense advertises event crowd dashboards, alerts, and connected displays; its legal contracting supplier remains unresolved. (crowdsense.events)
80. ShowTwin | Crowdcom
    - Crowdcom describes ShowTwin as a live visual layer over its Event Dashboard with connected operational information. ([crowdcom.nl](https://crowdcom.nl/en-gb/solution/showtwin))
81. AGIL Digital Twin - 3D Intelligence for Situational Awareness and Operational Efficiency
    - ST Engineering's AGIL Digital Twin brochure includes crowd analytics and queue management within spatial operations. ([stengg.com](https://www.stengg.com/getmedia/xx.xx-xx.xx-46c9-a71d-eee316615de6/AGIL-Digital-Twin.pdf))
82. Wintics | AI Video Analytics Software
    - Wintics advertises live crowd movement, counting, waiting-time, and overcrowding applications. ([wintics.com](https://wintics.com/en/))
83. Product | XXII
    - XXII presents CORE with physical-space dashboards, events, alerts, and flow-management applications. ([xxiiai.com](https://xxiiai.com/fr/produit))
84. VTrack - TechnoAware
    - TechnoAware markets VTrack as modular analytics covering flow, area counts, occupancy, and hot zones. ([technoaware.org](https://technoaware.org/vtrack/))

85. Smart City | A.I. Tech srl
    - A.I. Tech names crowd-specific applications within its Smart City commercial catalog. ([aitech.vision](https://www.aitech.vision/products/ai-smart/smart-city/))
86. VizioCrowd | Viziosense
    - Viziosense markets VizioCrowd for pedestrian and crowd-density measurement. ([viziosense.com](https://www.viziosense.com/fr/viziocrowd))
87. IRIS+ R2 2024 | IRIS Irisity
    - Irisity's IRIS+ release describes crowd-density events and crowd-statistics functions. ([irisity.com](https://irisity.com/sv/r2/))
88. RTSoft OMGE от ГК РТСофт
    - RTSoft markets OMGE for people counting, movement analysis, and passage through physical zones. ([rtsoft.ru](https://www.rtsoft.ru/catalog/programmnoe-obespechenie/prikladnoe-po-i-prilozheniya/rtsoft-omge/))
89. Модуль распознавания очередей и скоплений людей | NeuroCore
    - NeuroCore advertises queue, crowd-accumulation, overloaded-area, and visitor-flow functions. ([neuro-core.ru](https://neuro-core.ru/modules/congestion))
90. Видеоаналитика для бизнеса Insentry
    - Insentry's catalog advertises crowd accumulation, counterflow, queue analysis, people counts, and heatmaps. ([insentry.io](https://insentry.io/ru/platform/video-analytics))
91. Интеллектуальная видеоаналитика TRASSIR
    - TRASSIR advertises Queue Detector and mapping-related heatmap functions within its analytics portfolio. ([solutions.trassir.ru](https://solutions.trassir.ru/videoanalitika))
92. GV-AI Guard - GeoVision
    - GeoVision lists crowd detection and operator alerts within GV-AI Guard video-management software. ([geovision.com.tw](https://www.geovision.com.tw/product/GV-AI%2520Guard))
93. Surveillance Solution - Sensen
    - SenSen advertises occupancy monitoring, queues, crowd analysis, and public-space crowd management. ([sensen.ai](https://sensen.ai/surveillance/))
94. Pioneering AI-based Video Analytics for Intelligent Cities
    - The historical Intel and iOmniscient brief identifies software-based smart-city crowd applications, not current contract continuity. ([iomni.ai](https://iomni.ai/wp-content/uploads/2022/xx.xx/Intel-and-iOmniscient-on-Smart-Cities.pdf))
95. Products | Trakomatic
    - Trakomatic identifies OCrowd and its Insights Portal within its visitor-analytics portfolio. ([trakomatic.com](https://www.trakomatic.com/products))
96. On-Premise AI for Retail: Footfall, Heatmaps, Loss Prevention
    - Nodeflux markets on-premises retail footfall, checkout-queue, and heatmap functions. ([nodeflux.ai](https://www.nodeflux.ai/solutions/retail/))
97. pure.AIS - purematic
    - purematic markets pure.AIS for attraction visitor flow, occupancy, live waiting information, and guest-facing integrations. ([purematic.com](https://www.purematic.com/en/solutions/crowd-control/))
98. Video security in the stadium thanks to Dallmeier
    - Dallmeier markets stadium software modules alongside Panomera systems for crowd-flow, congestion, and incident-related operations. ([dallmeier.com](https://www.dallmeier.com/solutions/stadium))
99. How does it work - Crowdscan
    - CrowdScan advertises density counting, analytics, prediction, and integrated services through a non-camera observation route. ([crowdscan.be](https://www.crowdscan.be/how-does-it-work/))
100. Business Intelligence, Insights and Video Analytics | March Networks
    - March Networks advertises Searchlight Cloud business intelligence and occupancy-related operating alerts. ([marchnetworks.com](https://www.marchnetworks.com/solutions/business-intelligence/))

101. GSOC/NOC - Solutions - Actuate
    - Actuate markets crowd-behavior video alerts for security operations centers, a different commitment from operational response coordination. ([actuate.ai](https://actuate.ai/gsoc-noc/))
102. Retail - Cathexis
    - Cathexis advertises CathexisVision retail video analytics addressing crowd management and connected operating systems. ([cathexisvideo.com](https://cathexisvideo.com/market-solutions/retail/))

18.5. Benchmarking Analysis, 2025

A defensible benchmark begins with the population observed and the decision supported. ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■■■ ■■ ■■■ ■■■■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■ ■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ A narrower observation route can be appropriate where participation or controlled entry matches the task; it is unsuitable when the buyer requires independently established coverage of unrestricted areas.

For counting-led purchases, the relevant peer comparison is the full software-and-delivery commitment. ■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■ ■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■■■■■ Buyers should compare software access, counting dependencies, publication, and support separately; the historical CountWise brochure requires refreshed supply confirmation before it can support a present replacement decision.

Airport benchmarking should distinguish a broader operating platform from a managed measurement commitment. Veovo's CVG application has buyer-origin support, and Groupe ADP independently describes work with Outsight. ■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■ ■■ ■■■■■■■■■■■ ■■■■ ■■ ■■■■■■■ ■■■■■■ ■■■ ■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■■■ ■■■■■■■■■■■■ ■■ ■■■■ ■■■ ■■ ■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■ ■■■■■■■■■■ ■■ ■■■ ■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■■■■■ ■ ■■■■■■■■■ ■■ ■■■■■■■ ■■■■■■■■

Coordination and integration benchmarks require a different acceptance boundary. ■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■ ■■■■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■ ■ ■■■■■■■ ■■■ ■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■■■■

[illegible] Operators should compare the people entitled to participate, the systems included, and the obligations attached to event-critical support-not treat an integrated screen as a complete monitoring-and-response service.

[illegible] Evenesis and LCP Buildsoft Technology (M) Sdn Bhd describe event-software propositions without sufficiently distinguishing the contracted physical-flow, density, or capacity function from attendance administration. These suppliers remain relevant identities, but buyers should not accept roadmap or umbrella-platform descriptions as delivered functional equivalence.

Historical ownership and project records support narrower conclusions than current supply commitments. [illegible] A present offer identifying the deliverable, licensor, and support obligation would resolve the commercial distinction without requiring a technical reconstruction.

[illegible] For Macroscop and Two-i, present crowd-module scope and delivery terms remain unresolved. These uncertainties prevent a reliable substitution judgment, not a conclusion of inactivity or low significance.

Further regional alternatives need equally specific commercial confirmation. [illegible]

[redacted] The practical trigger is a named, supportable commercial commitment, not promotional visibility.

C&A Systems' current business description establishes a broad technology-services role but does not settle the crowd-specific application under comparison. [redacted] Such a route can be useful when it supplies otherwise unavailable local accountability; it is unsuitable when the application rights and continuity obligations remain fragmented.

The same discipline applies to broader telecommunications and platform portfolios. [redacted] A technically broad platform should not receive an automatic preference over a specialist, and a specialist should not receive an automatic preference where the buyer needs a managed service, institutional integration, or a jurisdiction-specific delivery commitment.

Sources & Evidence

1. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   · The customer's app is the described observation channel; complete visitor coverage is not established. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
2. Innovation
   · CVG identifies its use of Veovo's curb-to-flight flow-management system; this does not establish every platform module. ([cvgairport.com](https://www.cvgairport.com/business/innovation/))
3. Smart Access Control | Connect&GO
   · Connect&GO's access catalog distinguishes permissions and admission reporting from independent coverage of unrestricted activity. ([connectngo.com](https://www.connectngo.com/features/access-control))
4. Nommon | Population Insights
   · Nommon describes sample-based population indicators rather than a complete live venue census. ([nommon.es](https://www.nommon.es/products/population-insights/))
5. Réserver des espaces - BU
   · Lyon xx.xx requires attendance confirmation after Affluences reservations, distinguishing a booking from confirmed presence. ([bu.univ-lyon3.fr](https://bu.univ-lyon3.fr/reserver-des-espaces-xx.xx))
6. Platform: Infrastructure Intelligence | Outsight
   · Outsight's platform has sensing and connected-information dependencies relevant to observation comparability. ([outsight.ai](https://www.outsight.ai/platform/))

7. At the heart of innovation in our airports - Groupe ADP
   · Groupe ADP independently describes deployment with Outsight for passenger and baggage-flow monitoring. ([essentiel.groupe-adp.com](https://essentiel.groupe-adp.com/en/at-the-heart-of-innovation-in-our-airports/))
8. Terms of Service - Halo Solutions
   · Halo's terms distinguish authorized-user entitlement, support intake, response, and issue resolution. ([halosolutions.com](https://www.halosolutions.com/terms-of-service-xx.xx/))
9. Airport software | Xovis
   · AERO's advertised managed-delivery elements provide a distinct comparison with broader airport platforms. ([xovis.com](https://www.xovis.com/technology/airport-software))
10. ShowTwin | Crowdcom
    · ShowTwin supplies a shared visual operating picture; this is distinct from entitlement to every connected analytics component. ([crowdcom.nl](https://crowdcom.nl/en-gb/solution/showtwin))
11. People Counting Software & Analytics | SenSource
    · SenSource's Vea catalog separates occupancy reporting, connected sensors, API access, and subscription support. ([sensourceinc.com](https://sensourceinc.com/vea-software/))
12. T.M.A.S. People Counting Software & Analytics | SMS Storetraffic
    · SMS Storetraffic markets T.M.A.S. people-counting software and analytics. ([storetraffic.com](https://storetraffic.com/tmas-people-counting-software/))
13. People Counting Systems & Solutions | V-Count
    · V-Count connects BoostBI crowd and queue alerts and VCare occupancy with its sensor-and-software offering. ([v-count.com](https://v-count.com/people-counting/))
14. VemSpace Occupancy Management Brochure
    · Vemco's VemSpace brochure describes occupancy-management software and its supporting system relationship. ([vemcogroup.com](https://vemcogroup.com/hubfs/ENG_VemSpace%20_Occupancy%20Management_Brochure.pdf))
15. Industry Leading People Counting Software | Traf-Sys
    · Traf-Sys offers VisiCount people-counting reporting and optional data hosting. ([trafsys.com](https://www.trafsys.com/technology/software/))
16. 6 ways occupancy sensors boost space and cut waste | Density
    · Density describes occupancy-information applications for common spaces and airport lounges; the article is not a dedicated crowd-license commitment. ([density.io](https://density.io/resources/xx.xx-ways-occupancy-sensors-change-the-game))
17. Sistema automático de control de aforo en tiempo real | Dinycon
    · Dinycon advertises integrated real-time capacity-control systems for physical spaces. ([dinycon.com](https://www.dinycon.com/es/soluciones/control-de-aforo))
18. People Counting System | People Counter | FootfallCam - Morocco
    · FootfallCam reports Moroccan venue and analytics applications; these remain supplier-origin references rather than independent buyer confirmation. ([footfallcam.com](https://www.footfallcam.com/Home/WhereToBuy/Morocco))
19. People Counters for Concerts and Events by TallyFi
    · TallyFi combines synchronized event counts, supporting devices, an online dashboard, and subscription services. ([tallyfi.com](https://www.tallyfi.com/about/concerts_events))
20. Occupancy Product Brief | RetailNext
    · RetailNext describes occupancy visibility, thresholds, alerts, reporting, and queue or signage integrations. ([retailnext.net](https://retailnext.net/resources/product-briefs/brief-occupancy))

21. CountWise People Counting Solutions: General Overview
    · The historical CountWise brochure identifies counting applications and software; it does not establish continuing paid supply. ([herbert.co.uk](https://herbert.co.uk/wp-content/uploads/2014/xx.xx/CountWise-People-Counting-Solutions-Overview.pdf))
22. Embross Signs Contract with Multiple Greenland Airports
    · Embross' Greenland announcement concerns passenger-processing technology and transaction-point information, not established airport-wide crowd observation. ([embross.com](https://www.embross.com/news/embross-signs-contract-with-multiple-greenland-airports/))
23. Smart Airport - G Element
    · G Element describes NUCLEUS situational management with queue and crowd-related information; current product and licensing continuity remain unresolved. ([cn.gelement.com](https://cn.gelement.com/zh/markets/smart-airport/))
24. Shopping Mall CCTV: Face Recognition & Live Alerts | Sorveo
    · Sorveo distinguishes current presence detection from people-counting, occupancy, and queue analytics on its roadmap. ([sorveo.com](https://www.sorveo.com/industries/malls.html))
25. Servicios | Bingo LR
    · Bingo LR labels Access Control LR forthcoming, rather than establishing commercial release. ([bingolr.com](https://bingolr.com/servicios.php))
26. Swiss Core | AI Offsite Monitoring Software SA | Swiss Systems
    · Swiss Systems presents Swiss Core, but the page does not settle continuity of the previously identified crowd-specific package. ([swisssystems.co.za](https://www.swisssystems.co.za/platforms/core))
27. Baseer | Master Works
    · Master Works markets Baseer, but the inspected catalog does not establish the crowd-specific module needed for comparison. ([master-works.sa](https://master-works.sa/en/baseer))
28. Система VOCORD Tahion
    · VOCORD's Tahion catalog establishes surveillance software, not settled present licensing of a specific crowd application. ([vocord.ru](https://www.vocord.ru/products/vocord-tahion/))
29. Online Event Management Software Malaysia 2026 - Evenesis
    · Evenesis describes an event-software ecosystem, but the inspected material does not isolate the contracted physical crowd function. ([evenesis.com](https://www.evenesis.com/))
30. e-ticketing2u - Your Event Registration & Ticketing Solution
    · e-ticketing2u identifies LCP Buildsoft Technology (M) Sdn Bhd and crowd-management support without settling detailed physical-flow or capacity scope. (eticketing2u.com.my)
31. Artificial intelligence for traffic planning and safer surroundings | AFRY
    · AFRY's historical Flowity announcement identifies people-movement and large-event applications, not continuing external availability. ([afry.com](https://afry.com/en/newsroom/news/artificial-intelligence-traffic-planning-and-safer-surroundings))
32. DEEP SOLUTIONS SOFTWARE, SL at Catalonia Industry Suppliers Directory
    · The historical Catalonia government directory identifies DEEP SOLUTIONS SOFTWARE, SL and crowd monitoring, not a current named supply commitment. ([suppliers.catalonia.com](https://suppliers.catalonia.com/detail/deep-solutions-software-sl/xx.xx))
33. Argentine government publication - computer-program registration entries
    · The Argentine government publication records Urbix Technologies' historical SmartCrowd program ownership, not present external availability. ([argentina.gob.ar](https://www.argentina.gob.ar/sites/default/files/9_decreto_1329_2009.pdf))
34. Sumato Smart Mall | Sumato-Id
    · Sumato ID's historical Smart Mall description includes occupancy, dashboards, and alerts; continuing paid supply remains unestablished. ([sumatoid.com](https://www.sumatoid.com/sumato-smart-mall/))

35. SHIELD4CROWD - Catalogue of solutions for public space protection and crowd management
    · The public-space solutions catalog identifies ITTI's PROCeed crisis-training software and prospective crowd-related use, not established live operational control.
    ([beagle-labs.eu](https://www.beagle-labs.eu/wp-content/uploads/SHIELD4CROWD-Catalogue-of-solutions-for-public-space-protection-and-crowd-management.pdf))
36. Servicios Integrales de TI | Transformación Digital | C&A Systems
    · C&A Systems describes broad technology development and managed services without establishing the crowd-specific application under comparison.
    ([casystem.com.mx](https://casystem.com.mx/es-mx/quienes-somos))
37. AT&T Video Intelligence | Intelligent Video Surveillance Solutions
    · AT&T maintains a Video Intelligence offering; this record does not establish the specific crowd function or commercial responsibility allocation.
    ([business.att.com](https://www.business.att.com/products/att-iot-video-intelligence.html))
38. Dynamic Crowd Measurement - Solutions
    · Dynamic Crowd Measurement advertises density, movement, and occupancy solutions; its catalog alone does not establish repeatable contracted delivery.
    ([dynamiccrowdmeasurement.com](https://www.dynamiccrowdmeasurement.com/solutions))

19. Company Profiles

19.1. Bentley Systems

Bentley Systems supplies LEGION Model Builder and LEGION Simulator for evaluating pedestrian movement and comparing design or operating alternatives before implementation. Its October xx.xx 2026 product article includes construction phasing and temporary layouts, making the offering relevant when infrastructure sponsors are considering changes to entrances, circulation space, or passenger routes. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪

Bentley's published purchasing route includes a xx.xx-month Virtuoso subscription with credits redeemable for training or expert services, while enterprise licensing is separately offered. ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ The commercial trade-off is control over repeated planning changes versus the internal resources needed to maintain the analysis.

Sources & Evidence

1. LEGION | Bentley Systems
   - Bentley offers LEGION Model Builder and LEGION Simulator through a direct purchasing route, including a xx.xx-month Virtuoso subscription with credits for training or expert services and separately discussed enterprise options. The credits are not additional software licenses. ([bentley.com](https://www.bentley.com/products/legion/))
   - Company verification: Bentley markets LEGION as pedestrian modeling, simulation, and analysis software.
   - Company verification: The offering addresses crowd management, populated-space planning, safety, and operational scenarios.
2. Improving flow, comfort, and safety: LEGION crowd and pedestrian simulation software explained
   - Bentley's October xx.xx 2026 article describes LEGION for assessing design and operating alternatives before implementation, including construction phasing and temporary layouts. These are planning applications, not evidence of an ongoing monitoring service. ([bentley.com](https://www.bentley.com/en/blog/legion-pedestrian-simulation-software-people-movement/))
   - Company verification: Bentley's October xx.xx 2026 product article confirms continuing commercial activity for LEGION pedestrian and crowd-simulation software.
   - Company verification: The article identifies populated-space capacity, circulation, crowding, and operational planning as LEGION applications.

19.2. WaitTime

WaitTime markets crowd movement, density, occupancy, and queue analytics through an operations dashboard, alerts, and an open API. ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪

RESEARCH SAMPLE REPORT

[redacted] Its proposition therefore combines monitored-area information with separately assigned communication responsibilities; an available data feed is not itself a completed guest-guidance service.

Cisco's December xx.xx 2022 announcement documents WaitTime at the Etihad Stadium using existing Cisco infrastructure and Meraki cameras. It distinguishes installed concourse monitoring from prospective digital-signage integration and wider expansion. [redacted]

Sources & Evidence

1. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
   - Cisco's December xx.xx 2022 announcement reports WaitTime installed on the Etihad Stadium concourse using existing Cisco infrastructure and Meraki cameras. Digital-signage integration and expansion were prospective; the dated record does not establish continuing service or present contracting identity. ([newsroom.cisco.com](https://newsroom.cisco.com/c/r/newsroom/en/us/a/y2022/m12/manchester-city-collaborates-with-cisco-to-deploy-crowd-intelligence-solution-waittime.html))
   - Company verification: The dated deployment announcement identifies WaitTime as the crowd-intelligence technology used at Etihad Stadium.
   - Company verification: The reported application concerns crowd density, movement, and concourse congestion.
2. WaitTime Products and Services
   - WaitTime advertises live crowd and queue information, an operations dashboard, alerts, an open API, and display or mobile integrations. Its commercial process begins with demonstration and venue-specific scoping. The page does not identify a legal contracting entity. ([thewaittimes.com](https://www.thewaittimes.com/products-and-services))
   - Company verification: WaitTime markets software providing live crowd movement, density, occupancy, and queue information.
   - Company verification: Its offering includes an operations dashboard and guest-facing information integrations.

19.3. Milestone Systems

Milestone Systems offers crowd analytics through BriefCam alongside its video-management portfolio. [redacted] This gives security and operations buyers an option to extend an existing video relationship, but common portfolio ownership does not establish a combined software entitlement.

BriefCam's commercial scope varies materially by product. Investigator and Rapid Review emphasize review, while Protect and Insights include Respond and Research capabilities. [redacted]

[redacted]

Sources & Evidence

1. BriefCam video analytics software | Milestone Systems

   · Milestone markets BriefCam for occupancy and crowd-level monitoring, alerts, historical dashboards, and integration with XProtect and other video-management platforms. Its variant comparison distinguishes review-oriented products from products including response and research modules. ([milestonesys.com](https://www.milestonesys.com/products/briefcam?utm_source=openai))

2. New beginnings for Milestone

   · Milestone's March xx.xx 2025 article reports its acquisition of BriefCam and Arcules during 2024 and describes the resulting video-management, analytics, and surveillance-as-a-service portfolio. This establishes corporate portfolio context, not a combined customer entitlement. ([milestonesys.com](https://www.milestonesys.com/articles/new-beginnings-for-milestone/))

   · Company verification: Milestone Systems' March xx.xx 2025 article reports acquisition of BriefCam and Arcules during 2024.

   · Company verification: Milestone describes the combined offering as including video management software, video analytics, and surveillance as a service.

3. BriefCam Frequently Asked Questions

   · The BriefCam FAQ identifies variant-specific licensing and expandable user, research-user, camera-channel, and real-time response-channel entitlements. It also distinguishes supported video-management integrations, supporting order-specific verification rather than universal compatibility assumptions. ([milestonesys.com](https://www.milestonesys.com/link/534f0cb3e589469d98d6d2474266d99b.aspx?epslanguage=en))

4. BriefCam video analytics software | Milestone Systems

   · Company verification: Milestone's current BriefCam catalog establishes a marketed software portfolio with real-time occupancy and crowd-level monitoring.

   · Company verification: BriefCam is presented within Milestone's product portfolio and integrates with video-management platforms, including XProtect.

   · Company verification: This supplies the substantive current crowd-product support missing from the captured release-index evidence.

5. Releases - Milestone Systems

   · Company verification: Milestone's inspected release index includes BriefCam software releases, including BriefCam 2025 R1.

   · Company verification: The release index is portfolio-continuity evidence, not a substitute for a crowd-specific product catalog.

19.4. Veovo

[redacted] The relevant distinction is the connection between passenger-flow information and airport operating decisions, rather than sensing alone. CVG

Airport independently identifies its use of Veovo's curb-to-flight flow-management system for decision-making, supporting a named buyer application without establishing use of every platform module.

Airport buyers should separate the required flow functions from the broader operating-platform proposal and assign responsibility for connected information and resulting decisions. A platform purchase is more defensible where the airport can coordinate the relevant system owners and operational responses. ▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪ ▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪

Sources & Evidence

1. Airport Operations Software | Intelligent Airport Platform | Veovo
   - Veovo's airport platform includes Flow Management, Queue Management, forecasting, and resource functions. It advertises on-premises and cloud deployment, including SaaS and managed-service options, and connects passenger-flow information with operating decisions. ([veovo.com](https://veovo.com/airports))
   - Company verification: Veovo's airport software platform includes Flow Management and Queue Management.
   - Company verification: The platform connects people-flow information, predictions, and operational decisions and offers cloud and on-premises deployment options.
2. About Us - Veovo
   - Veovo identifies itself as a subsidiary of Gentrack Group Limited. This supports the profile's ownership attribution without implying a parent guarantee of customer-specific obligations. ([veovo.com](https://veovo.com/about-us))
   - Company verification: Veovo's company page identifies it as a subsidiary of publicly traded Gentrack Group Limited.
   - Company verification: The page describes Veovo as an operating airport-product and technology business with international offices.
   - Company verification: This resolves the captured parent-company attribution gap without introducing a separate Gentrack row.
3. Innovation
   - CVG Airport identifies its use of Veovo's curb-to-flight flow-management system to improve decision-making. This is buyer-origin support for a named application, not evidence that CVG purchased every Veovo platform module. ([cvgairport.com](https://www.cvgairport.com/business/innovation/))
4. CVG Airport adopts Veovo's Curb-to-Flight passenger flow management for data-driven passenger enhancements
   - Company verification: CVG Airport announced adoption of Veovo's airport-wide passenger-flow technology on May xx.xx 2021.
   - Company verification: The airport describes using live and historical passenger occupancy and movement information for operational decisions and crowding reduction.

19.5. Crowd Connected

Crowd Connected's location-analytics offering uses the customer's mobile application to provide heatmaps, dwell and flow analysis, a web dashboard, APIs, and exports. This route can

support analysis of participating visitors' journeys and engagement across venue areas. ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■■■■■ ■■■■■■■■■

The April 2026 standard terms identify Crowd Connected Ltd, registered in England, and provide plan-dependent licensed access to its services. ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■ Venues should establish which commitments apply to their operating organization and app developer rather than treat access to one interface as authority for every use.

Use restrictions can also affect commercial access. The standard terms permit immediate termination for specified surveillance or critical-national-infrastructure uses without prior written consent. ■ ■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■ ■■■■■■■ ■■ ■■ ■■■■■■■■ ■■■■■■■■■■■■■ ■■■ ■■■■■■■■■■■ ■■■■■■ ■■ ■■■■ ■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■

Sources & Evidence

1. Location Analytics and Footfall Counting | Heatmaps, Dwell Time, and Flow Analysis
   - Crowd Connected describes app-derived location analytics with heatmaps, dwell and flow analysis, a dashboard, APIs, and exports. Its described channel depends on visitors having the customer's app; complete visitor coverage is not established by this offering description. ([crowdconnected.com](https://www.crowdconnected.com/solutions/location-analytics/))
2. Customer Terms & Conditions
   - Crowd Connected's customer-terms framework distinguishes typical licensees, web-console users, SDK integrators, enterprise customers, and resellers, with different applicable documents and service-level provisions. ([crowdconnected.com](https://www.crowdconnected.com/customer-terms))
3. Crowd Connected Standard Terms and Conditions, Version 4.0, April 2026
   - The April 2026 standard terms identify Crowd Connected Ltd, registered in England, and grant plan-dependent licensed access. They permit immediate termination for specified surveillance or critical-national-infrastructure uses without prior written consent; a master services agreement may vary the standard terms. ([crowdconnected.com](https://www.crowdconnected.com/legal/standard-terms-and-conditions.pdf))
4. Crowd Connected Platform
   - Company verification: Crowd Connected offers an indoor and outdoor location platform with analytics and integrations.
   - Company verification: The platform includes near-real-time situational heatmaps, device counts, dwell-time reporting, and data outputs.

19.6. accesso

accesso markets LoQueue for virtual queuing at physical attractions, including the Qsmart mobile solution, reservation-fed operational dashboards, and interfaces to ticketing and other systems. Its catalog separately describes Qview for measuring physical queues. ■■■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■■■■ ■■■■ ■■■■■■■■■ ■ ■■■■■■ ■■■ ■■■■■■■■■■ ■■■■■■■■■■

[illegible] Starting with a defined attraction can contain the implementation scope; an enterprise arrangement offers common coordination only if operating processes and responsibilities are agreed. Neither an API description nor an existing accesso relationship establishes that all required modules and support obligations are included.

Sources & Evidence

1. accesso LoQueue Virtual Queuing System | accesso
   - accesso markets LoQueue and Qsmart for virtual queuing, reservation-fed dashboards, and interfaces with ticketing and other systems. Its catalog separately describes Qview physical-queue measurement and implementation services. It allows consideration of a defined attraction or broader deployment. ([accesso.com](https://accesso.com/capabilities/products/loqueue/))
   - Company verification: accesso markets LoQueue for virtual queuing at physical attractions, with live operational dashboards and queue-measurement functions.
2. Client Support | accesso
   - accesso publishes a LoQueue-specific support route separately from other product support routes. This supports distinguishing product escalation arrangements, but does not establish a customer's contracted response or restoration commitments. ([accesso.com](https://accesso.com/contact-us/client-support/))
3. accesso Partners with Parques Reunidos to Serve as Enterprise Provider of Queue Management Services
   - The August 2022 announcement reports a signed five-year enterprise queue-management agreement with Parques Reunidos and planned LoQueue extensions in North America and Europe. It establishes the dated relationship, not continuing implementation at every venue. ([accesso.com](https://accesso.com/news/accesso-partners-with-parques-reunidos-to-serve-as-enterprise-provider-of-queue-management-services/))
4. Investor Information | accesso
   - Company verification: The investor page, updated October xx.xx 2026, identifies accesso Technology Group plc and its English company registration.
   - Company verification: accesso states that it generates revenue from virtual-queuing solutions as well as its other attraction technologies.
   - Company verification: The page identifies active international subsidiaries, supporting group-level reporting of the LoQueue portfolio.

19.7. accu:rate GmbH

[illegible] For planners, its distinct commercial proposition is the ability to match the software entitlement to a project's requirements rather than assume that every project needs an

identical package. That flexibility does not independently establish lower total cost or superior planning outcomes.

A December xx.xx 2023 Vectorworks article documents the crowd:it plugin and its connection to a separately identified simulation application. The article was contributed by an accu:rate executive, so it establishes the described integration relationship rather than independent performance validation. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪ ▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪ ▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪

Sources & Evidence

1. Software - accu:rate
   - accu:rate markets crowd:it simulation software with configurable license scope, functional coverage, and user access, and identifies Vectorworks and Revit import connections. These are advertised commercial capabilities, not independent evidence of superior outcomes. ([accu-rate.de](https://www.accu-rate.de/en/software/))
2. Impressum - accu:rate
   - The official imprint identifies accu:rate GmbH and its Munich registration and business location, connecting the exact company identity to the offering. ([accu-rate.de](https://www.accu-rate.de/en/impressum/))
   - Company verification: accu:rate's imprint identifies accu:rate GmbH, its Munich address, and its commercial-register details.
   - Company verification: This resolves the legal identity behind the captured crowd:it license-purchasing and integration evidence.
3. Crowd Simulation with crowd:it & Vectorworks
   - The December xx.xx 2023 Vectorworks article documents the crowd:it plugin and a separately identified simulation application. It is an accu:rate executive's guest contribution, not independent outcome validation, and its promotional access offer ended May xx.xx 2024. ([vectorworks.net](https://www.vectorworks.net/en-US/newsroom/explore-the-crowdit-plugin-in-vectorworks))
   - Company verification: A December xx.xx 2023 Vectorworks article documents accu:rate's crowd:it plugin and commercial access offer for Vectorworks customers.
4. SHIELD4CROWD - Catalogue of solutions for public space protection and crowd management
   - Company verification: Identifies Munich-based accu:rate and its crowd:it pedestrian-flow software.
5. crowd:it download - accu:rate
   - Company verification: accu:rate's crowd:it page offers a starter license and states that users can purchase an appropriate license.
   - Company verification: The page identifies accu:rate GmbH and a Munich address.

19.8. Connect&GO

Connect&GO markets an attraction-management platform combining ticketing, access control, capacity, staffing, and real-time information. Its Smart Access Control offering describes zone and ticket-type rules, reentry permissions, access-point reporting, and integration with Alvarado gates. ▪▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪ ▪▪ ▪▪▪▪ ▪▪▪▪▪ ▪▪ ▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪ ▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪▪▪▪▪▪ ▪▪▪▪▪▪ ▪▪▪▪▪▪

[illegible] An integrated purchase can consolidate admission-related workflows, but a buyer needing only additional crowd insight may find a wider platform replacement disproportionate. The advertised transition assistance is not evidence of disruption-free migration.

Peek reported its acquisition of Connect&GO on November xx.xx 2025. This changes the ownership context without establishing that Peek's other products are included or that individual customer contracts have migrated. [illegible]

Sources & Evidence

1. Attraction & Theme Parks | Connect&GO
   · Connect&GO advertises modular attraction management combining ticketing, access control, capacity, staffing, and real-time information, with on-site implementation, training, support, and an on-call protocol. The promotional transition description is not customer-specific evidence of disruption-free migration. ([connectngo.com](https://www.connectngo.com/solutions/attraction-park))
   · Company verification: Connect&GO's attraction-management platform advertises unified ticketing, access control, capacity, staffing, and real-time operational insights.
2. Smart Access Control | Connect&GO
   · Smart Access Control describes zone and ticket-type permissions, reentry rules, access-point reporting, and Alvarado gate integration. Its dashboard distinguishes scans, unique tickets, and admissions, supporting caution against equating scan activity with complete population or density coverage. ([connectngo.com](https://www.connectngo.com/features/access-control))
3. Peek Acquires ACME Ticketing and Connect&GO
   · Peek's November xx.xx 2025 announcement reports its acquisition of Connect&GO and describes an intention to combine capabilities. It does not establish migrated customer contracts, a particular contracting entity for a proposed purchase, or completed product integration. ([peekpro.com](https://www.peekpro.com/blog/peek-acquires-acme-connect-go-raises-70m))
4. Connect&GO Provides Contactless Solutions for Leisure and Entertainment Properties
   · Company verification: Connect&GO identifies itself as Montreal-based and describes virtual queuing, crowd-capacity dashboards, and zone-level capacity monitoring.

19.9. Nommon Solutions and Technologies, S.L.

Nommon Solutions and Technologies, S.L. markets Population Insights for area-level population presence and visitor analysis. [illegible] This is interpreted spatial intelligence rather than merely a raw data feed; sample-based observations should not be equated with a complete live census of everyone inside a venue.

[redacted] Recurring integration and a bounded project deliverable create different obligations. Nommon also invites platform demonstrations, but neither a demonstration nor advertised continuously updated information establishes a contractual live-monitoring commitment.

Sources & Evidence

1. Nommon | Population Insights
   - Population Insights advertises mobile-location-based population maps and visitor indicators, sample-based information, API or bespoke-project delivery, restricted-use through open-data licenses, and visualization on request. These declarations support the profile's distinction between analytical access and a complete live venue census. ([nommon.es](https://www.nommon.es/products/population-insights/))
   - Company verification: Population Insights provides dynamic population maps, visitor-footfall and presence indicators through a licensed API platform or bespoke projects.
   - Company verification: The product page identifies Nommon Solutions and Technologies, S.L. and its Madrid business contact.
2. Privacy policy - Nommon
   - Nommon's privacy notice identifies Nommon Solutions and Technologies SL as the responsible Madrid-based company, grounding the entity attribution without establishing ownership. ([nommon.es](https://www.nommon.es/privacy-policy/))
   - Company verification: Nommon's privacy record identifies Nommon Solutions and Technologies SL as the responsible company based in Madrid, Spain.
3. Nommon | Tourism
   - Nommon describes Population Insights as addressing tourists' public-space use and time spent in different city or regional areas, supporting the planning-buyer context rather than a guaranteed venue census. ([nommon.es](https://www.nommon.es/industries/tourism/))
4. Nommon | Request a demo
   - The Nommon Platform demonstration request includes Population Insights. It establishes an evaluation contact route, not customer-specific availability or a live-monitoring service commitment. ([nommon.es](https://www.nommon.es/platform/))

19.10. Affluences

Affluences connects institutional space management with visitor-facing information and reservations. Its commercial offering separates licensed access to a SaaS flow-management platform from counting hardware available for purchase or rental. [redacted] Université Jean Moulin Lyon xx.xx provides buyer-origin corroboration of the reservation role: its library instructions direct users to Affluences through the website or application and require attendance confirmation through a QR code or library reception. That workflow illustrates why a reservation is not equivalent to confirmed presence. [redacted]

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Sources & Evidence

1. Affluences : découvrez nos différentes offres
   · Affluences separates licensed SaaS platform access from integrated counting hardware offered for rental or purchase; software license selection depends on needs and the number of spaces. ([pro.affluences.com](https://www.pro.affluences.com/offres))
   · Company verification: Affluences offers licensed access to its SaaS crowd-flow management software, alongside integrated counting hardware.
2. Solution de comptage et réservation pour bibliothèque Affluences
   · Affluences advertises library occupancy reporting, crowd-information publication through its website, application and institutional channels, and reservations for seats, rooms and activities. These are advertised functions, not proof that every license includes every module. ([pro.affluences.com](https://www.pro.affluences.com/bibliotheques-mediatheques))
3. Réserver des espaces - BU
   · Lyon xx.xx's library instructions direct users to Affluences reservations through the application or website and require attendance confirmation through a QR code or reception. This corroborates the institutional workflow, not complete measurement of physical occupancy. ([bu.univ-lyon3.fr](https://bu.univ-lyon3.fr/reserver-des-espaces-xx.xx))
4. Mentions légales - Affluences
   · Company verification: The legal notice identifies AFFLUENCES SAS, registered in Paris, and describes its crowd measurement, analysis, waiting-time, and occupancy business.

19.11. Outsight

Outsight provides a LiDAR-linked spatial-intelligence route to crowd monitoring. Its platform advertises occupancy, queue and dwell information through dashboards, alerts and documented interfaces, alongside project support involving multiple sensor vendors. ■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■ ■■■■ ■■■■■■■■ ■■■■■■ ■■■■■■ ■■■■■■ ■■■■ ■■ ■■■■■■ ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■ ■■■■■■■■■■■

Groupe ADP's own airport-innovation account describes deployment with Outsight at Paris airports, allowing mobile ground staff to monitor passenger and baggage flows. This corroborates an operator relationship beyond the supplier-hosted Charles de Gaulle testimonial, but does not establish coverage or service commitments for another airport. ■■■ ■■■■■■■■■■■ ■■■■ ■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■ ■■■■ ■■■■■■■■■■■■■■ ■■■ ■■■■■■ ■■ ■■■

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Sources & Evidence

1. Platform: Infrastructure Intelligence | Outsight
   · Outsight advertises occupancy, queue and dwell analytics, dashboards, alerts, documented APIs and multi-vendor project support. Its platform also accepts complementary camera, wireless and business-system inputs, supporting deployment-specific integration and data-scope checks. ([outsight.ai](https://www.outsight.ai/platform))
2. At the heart of innovation in our airports - Groupe ADP
   · Groupe ADP describes deployment with Outsight at Paris airports and mobile ground staff monitoring passenger and baggage flows. This is buyer-origin corroboration of a specific operator relationship, not a service commitment for another airport. ([essentiel.groupe-adp.com](https://essentiel.groupe-adp.com/en/at-the-heart-of-innovation-in-our-airports/))
3. ADP Group Testimonial at CDG | Insights
   · The supplier-hosted Charles de Gaulle testimonial describes baggage-area flow monitoring and responses by authorized personnel. It supports separating software-provided information from the airport's responsibility to act. ([outsight.ai](https://www.outsight.ai/insights/groupe-adp-testimonial-about-lidar-software-outsight/))
   · Company verification: Outsight's Groupe ADP testimonial describes its software-supported passenger and baggage-flow monitoring at Paris-Charles de Gaulle.

19.12. Halo Solutions

[redacted] Its advertised functions include shared incident records, task scheduling, mobile reporting, cross-team transfers and management oversight for venues, arenas and service providers. The relevant purchase is accountable operational information and task ownership across teams.

Halo's February 2025 Belfast arena announcement reports a contract, initial event use and planned departmental expansion. [redacted] Announced future modules should not be treated as existing contractual functionality.

The service terms identify Halo Solutions Ltd as the supplier and license access to authorized individual users for internal business operations. Operators involving outsourced security or facilities teams should confirm their access entitlement rather than assume a shared dashboard grants unrestricted participation. [redacted]

Sources & Evidence

1. Daily Operations - Halo Solutions
   · Halo advertises shared incident and task management, mobile reporting, cross-team transfers and oversight for venues, arenas and service providers. These functions substantiate an operational-coordination role rather than a crowd-density measurement claim. ([halosolutions.com](https://www.halosolutions.com/applications/daily-operations/))

2. Halo Solutions to help keep people safe at The O2 Arena, Belfast in its 25th anniversary year and beyond
   · Halo's February xx.xx 2025 Belfast arena announcement reports a contract and initial event use while describing broader departmental implementation and additional modules as planned developments. It does not establish completion of the entire roadmap. ([halosolutions.com](https://www.halosolutions.com/halo-sse-arena/))
3. Terms of Service - Halo Solutions
   · Halo's terms identify Halo Solutions Ltd, limit use to licensed authorized users for internal operations, and distinguish continuous support-ticket intake from resolution time. These terms support checking contractor access and event-critical escalation commitments. ([halosolutions.com](https://www.halosolutions.com/terms-of-service-xx.xx/))
4. Sectors - Halo Solutions
   · Company verification: Halo offers a shared operational platform connecting security, safety, facilities, and external teams for complex multi-team environments.
   · Company verification: This establishes an advertised coordination role, not a confirmed crowd-density analytics product.

19.13. Saudi Company for Artificial Intelligence (SCAI)

Saudi Company for Artificial Intelligence (SCAI) markets SCAI Motion for occupancy, pedestrian flow, crowd distribution, congestion and queue-related applications. Its distinctive commercial proposition includes deployment on locally hosted Saudi cloud platforms. ■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■ ■■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■ ■■■■■ ■■■■■■■■■■■■■■■ ■■■ ■■ ■■■ ■■■■■■■■■■■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■ ■■ ■■■■■■■■■

KAFD's January 2024 announcement establishes a partnership with SCAI for planned smart-traffic and mobility services. It provides a documented district relationship, not confirmation of a completed SCAI Motion crowd-management installation. ■■■ ■■■■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■ ■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■■■■■■■■■■■■

Saudi buyers with a local-hosting requirement can evaluate Motion against that requirement while obtaining the actual cloud-provider, data-location, application-scope and support commitments in writing. ■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■■ ■■■■■■ ■■■■■■■■ ■■■■■■■■■■ ■■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■ ■■■■■ ■■■■■■■■ ■■■■■■ The hosting proposition can address a purchasing condition, but cannot compensate for an unsuitable application scope or unclear responsibility for connected systems.

Sources & Evidence

1. SCAI - SCAI Motion
   · SCAI Motion advertises crowd distribution, occupancy, pedestrian-flow, congestion and queue applications and local Saudi-hosted cloud deployment. The catalog establishes these offering declarations, not customer-specific clearance, entitlement or delivery. ([scai.sa](https://scai.sa/product/scai-motion))
   · Company verification: Saudi Company for Artificial Intelligence identifies SCAI Motion as its commercial offering for crowd distribution, occupancy, pedestrian flow, congestion, and queue-related applications.
   · Company verification: The product page advertises local Saudi-hosted cloud deployment and event and sporting-venue use cases.

2. KAFD and SCAI Unveil Transformative Smart City Project
   - KAFD's January 2024 announcement describes its partnership with SCAI for planned smart-traffic and mobility platforms. It does not identify a completed SCAI Motion crowd-management installation. ([kafd.sa](https://www.kafd.sa/en/media-centre/kafd-and-scai-unveil-transformative-smart-city-project?RefID=semik%3FRefId%3Dsemik))
3. SCAI and Publicis Groupe Middle East collaborate to drive digital transformation in the Kingdom
   - Company verification: SCAI's February xx.xx 2024 corporate announcement identifies Saudi Company for Artificial Intelligence as wholly owned by the Public Investment Fund.
   - Company verification: The statement supports ownership attribution for the operating supplier behind the captured SCAI Motion product.

19.14. inq.

inq. advertises crowd functions within a managed video-analytics portfolio. ■■■ ■■■■■ ■■ ■■■■■■■■ ■■■ ■■■■■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■ ■■■■■ ■■■■■■■■■ ■■■■■ ■■■ ■■■■■■■■ ■■■■■■ ■■ ■■■■■■■■■■■ ■■■■■■■■ ■■■ ■■ ■■■■■■■■ ■■ ■■■■■■■■■■■■■ ■■■■■■■■ ■■■■ ■■■■■■■■■■■ ■■ ■■■■■■■■■■ ■■■■■■■■■■■■■■■■ ■■■■■■ ■■■ ■■■■■■■■■ ■■ ■■■■■ ■■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■■

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Sources & Evidence

1. Edge AI & IoT - inq.
   - inq. advertises managed video analytics and retail crowd-management functions, including aisle heatmaps, and gives South African and Mauritian office references. These establish an offering and contact context, not a deployment's seller of record or upstream license allocation. ([inq.inc](https://inq.inc/edge-ai-iot/))
   - Company verification: inq. markets a Video AI Platform and Retail Analytics offering expressly including crowd management and aisle heatmaps.
   - Company verification: The record provides Johannesburg and Mauritius head-office addresses.
2. Artificial Intelligence - inq.
   - inq.'s Vision AI description advertises use of existing IP surveillance cameras. The procurement implication is conditional: reuse does not itself allocate equipment, application or integration responsibilities. ([inq.inc](https://inq.inc/artificial-intelligence/))
3. EDGE AI et IOT - inq.
   - Company verification: inq.'s Côte d'Ivoire catalog advertises crowd-management video analytics and real-time dashboards.
   - Company verification: The same record provides an Abidjan business address, establishing a local offering and contact path rather than confirmed local sales.

19.15. Awiros

[redacted] Ltd., with a sales contact route and headquarters in Gurugram. Its distinct commercial role is an application ecosystem rather than a single crowd application: AppStack advertises application exploration and purchasing, and Awiros states that independent developers can publish applications to its marketplace.

[redacted] These are platform-level declarations, not assurance that every crowd application has identical deployment support or entitlement. Buyers should identify the selected application, its licensor, required platform rights and the party responsible for application and interface support before ordering or adding functions.

Application selection can keep procurement focused on a specific crowd task, but introduces a dependency on the supporting platform and its application ecosystem. Buyers needing a narrow function should compare the complete application-and-platform commitment with a packaged crowd-software offer. [redacted]

Sources & Evidence

1. Event Management
   - Awiros advertises event crowd estimation, inflow and dwell analytics and a dashboard; the page identifies the brand as a registered trademark of Awidit Systems Pvt. Ltd. ([awiros.com](https://awiros.com/event-management-industry))
   - Company verification: Awiros markets an event-management platform with crowd estimation, crowd-inflow analytics, and operational dashboards.
   - Company verification: The page identifies Awiros as a registered trademark of Awidit Systems Pvt. Ltd.
2. Products
   - Awiros describes AppStack application selection and purchasing, platform deployment on premises, edge-and-cloud or cloud, and inputs from third-party video-management systems. These portfolio declarations do not establish identical entitlement or deployment support for every application. ([awiros.com](https://awiros.com/products))
3. Contact Us
   - Awiros identifies its Gurugram headquarters and sales route and states that independent developers can publish applications to its marketplace. This supports checking application-specific commercial rights and support rather than assuming a single undifferentiated software entitlement. ([awiros.com](https://awiros.com/contact-us.html))
   - Company verification: Awiros provides sales contact details and identifies a Gurugram headquarters address.

19.16. VACAN

[redacted] Its advertised cloud platform combines location-dependent sensor, camera or staff inputs with availability information delivered through signage, web maps, smartphones and mobile queuing. The

purchasing scope therefore extends beyond an internal analytics dashboard to the channels through which visitors receive information.

JR East's 2020 announcement described integration of VACAN availability information and the historical VACAN Noline queue service with Tokyo Station Navi. Gransta's website also links visitors to a VACAN service. ■■■■■ ■■■■■■■ ■■■■■■■ ■ ■■■■■■■■ ■■■■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■ ■■■■■■■ ■■■■■■■■■ ■■■■■■■■■■■■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■■■■ ■■■■■■■■ ■■■■■■■■■

Operators should assign responsibility for destination information, publication updates and channel maintenance before procuring the complete service. ■■ ■■■■■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■ ■■■ ■■ ■■■■■■■ ■■ ■■■■■■■ ■■■■■ ■■■■■■■■■■■■ ■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■ ■■■■■■■ ■■■■■■ ■■■ ■■■■ ■■■■■■■■■■■■■ ■■■■■■■■■ ■■ ■■■■■■ ■■■■■■■■ ■■■ ■■■■■■■■■■■■ ■■■■■■■■■■■■ Overseas buyers should therefore obtain project-specific delivery confirmation before treating a Japanese reference as a transferable service commitment.

Sources & Evidence

1. VACAN - Real-time Crowd Visualization & Digital Signage Platform, Japan
   - VACAN advertises cloud crowd information distributed through signage, maps, smartphones and mobile queuing, with location-dependent inputs. It identifies Japan as its primary market and makes international projects subject to feasibility discussion. ([corp.vacan.com](https://corp.vacan.com/signage/en/))
   - Company verification: VACAN markets a Japan-origin crowd-visualization platform combining congestion analytics with signage, maps, and mobile queuing.
   - Company verification: Its official page names Japanese retail, station, and arena applications as supplier-reported deployments.
2. スマートフォンアプリ『東京ステーションナビ』8 月 3 日本格運用開始
   - JR East's 2020 announcement describes VACAN availability information and VACAN Noline queuing integration with Tokyo Station Navi. This corroborates a historical visitor-service relationship, not unchanged subsequent operation. ([jreast.co.jp](https://www.jreast.co.jp/press/2020/tokyo/20200730_t01.pdf))
3. サイトマップ | 東京駅 構内のショップ・レストラン グランスタ【公式】
   - Gransta's official website includes a visitor link to its VACAN service. The link establishes a publication route, not uptime, complete coverage or the current configuration behind it. ([gransta.jp](https://www.gransta.jp/sitemap/))

19.17. Qmatic

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Deployment alternatives address different purchasing requirements. ■■■■■■■ ■■■■■■■■■■ ■■■■■■■■■■ ■■■■■ ■■ ■■■■■■■■■■■■ ■■■■ ■■■ ■■■■■■■■■■ ■■ ■■■■■■■■ ■■■■■■■■■■■ ■■■■■■■■■

[redacted] Buyers should require an agreed migration and acceptance scope before retiring an existing installation.

Version-specific support is a separate commitment from platform availability. Qmatic's June xx.xx 2026 announcement schedules Orchestra xx.xx support, updates, maintenance releases, and bug fixes to end July xx.xx 2027, and recommends an upgrade path to Orchestra xx.xx. [redacted]

Ownership and contracting attribution also require separation. Baird's June 2025 transaction record identifies Valsoft Corporation Ireland as the acquirer of Qmatic Group AB. [redacted]

In Switzerland, Qmatic's August xx.xx 2026 Corvice AG announcement establishes an intended local delivery, implementation, and support route, not a completed installation or customer-specific service level. [redacted] The benefit of local delivery must be weighed against the additional contractual dependency; partner appointment alone is insufficient purchasing assurance.

Sources & Evidence

1. Qmatic | FAQs
   · Qmatic describes Experience Cloud as multi-tenant SaaS and Orchestra as a modular on-premises platform for complex requirements, multiple locations, or large premises. These descriptions establish marketed deployment alternatives, not customer-specific equivalence.
   ([qmatic.com](https://www.qmatic.com/resources/faq))
2. Qmatic Welcomes Corvice AG as New Premier Solution Partner in Switzerland
   · Qmatic announced Corvice AG as a Swiss Premier Solution Partner on August xx.xx 2026, assigning delivery, implementation, and support roles. The announcement does not establish a completed customer installation or customer-specific service commitments.
   ([qmatic.com](https://www.qmatic.com/qmatic-insights/qmatic-welcomes-corvice-ag-as-new-premier-solution-partner-in-switzerland))

3. Visitor Management System - Qmatic
   - Qmatic markets visitor-number limits, appointment booking, self-service check-in, digital signage, and Mobile Ticket remote waiting with queue-progress updates. These are advertised functions, not independently established customer outcomes. ([qmatic.com](https://www.qmatic.com/solutions/visitor-management-system))
   - Company verification: Qmatic offers visitor-management software for limiting visitor numbers and managing physical visitor flow.
   - Company verification: Its Mobile Ticket offering permits remote waiting and live queue progress.
4. Queue management | Concierge
   - Qmatic Concierge supports front-line staff issuing queue tickets, checking in scheduled visitors, and booking or rescheduling services for appointment and walk-in arrivals. It documents staff-assisted reception rather than replacement of service personnel. ([qmatic.com](https://www.qmatic.com/products/concierge))
5. Judicial Branch of Arizona in Maricopa County - IT Strategic Plan 2026-2028
   - The Maricopa 2026-2028 IT strategic plan lists a Clerk of Superior Court project to move onsite Qmatic customer queue management to hosting, with planned completion in FY26 and status On Hold. It does not identify the hosted platform or subsequent completion. ([azcourts.gov](https://www.azcourts.gov/Portals/xx.xx/xx.xx/Maricopa_ITSP_26-28_combined.pdf))
6. End of Life Announcement for Qmatic Orchestra 6
   - Qmatic's June xx.xx 2026 announcement schedules Orchestra xx.xx support, updates, maintenance releases, and bug fixes to end July xx.xx 2027, and recommends planning an upgrade to Orchestra xx.xx. ([qmatic.com](https://www.qmatic.com/product-updates/end-of-life-announcement-for-qmatic-orchestra-xx.xx))
7. Qmatic Is Acquired by Valsoft | Baird
   - Baird's June 2025 transaction record states that Valsoft Corporation Ireland acquired Qmatic Group AB and identifies Baird as exclusive financial adviser to Qmatic and Altor on the transaction. ([rwbaird.com](https://www.rwbaird.com/transactions/investment-banking/dealcard/xx.xx/))
8. General Terms and Conditions of Sale and Delivery - Version August 2026
   - The August 2026 terms name Q-MATIC AB as provider, distinguish the customer's separate reseller agreement, deny reseller authority to bind Qmatic, and permit termination of services or licenses following specified uncured distributor defaults. Applicability depends on the customer's contractual framework. ([qmatic.com](https://www.qmatic.com/hubfs/General%20Terms%20and%20Conditions%20of%20Sale%20and%20Delivery%xx.xx%xx.xx.2026%xx.xx-xx.xx.pdf))

20. Companies Covered

Table 422. Global Crowd Management Software Market, Companies Covered

Company
A.I. Tech srl
accesso
accu:rate GmbH
Actuate
ADDtix
AerVision Technologies
Aetherix
Affluences
AFRY
Agoop
Aislelabs
ALGI
AllGoVision Technologies Private Limited
AnyLogic
AP Resolutions
Ariadne Maps GmbH
AT&T
AttendX
AVEKS
AvidBeam
Awiros
Axis Communications
AxxonSoft
Bentley Systems
Beonic
Bingo LR
Bosch Sicherheitssysteme GmbH
C&A Systems
Cathexis
Cisco

Table 422 - continued

Company
CityTraffic
CLEAR
CLICR
Connect&GO
Copenhagen Optimization
CoreGo
CountWise
Crowd Connected
Crowd Dynamics
Crowdcom B.V.
CROWDEDEVENTS
CrowdGuard
CrowdScan
CrowdSense
Cylix Technologies, Inc.
Dahua Technology
Dallmeier
DataCode
Daylight
DEEP SOLUTIONS SOFTWARE, SL
Density
Digifort
Digita
Dingo AI Solutions
Dinycon Sistemas
Dynamic Crowd Measurement
EEX
Elipse
Elm
Eluviant
Embross
Enova

Table 422 - continued

Company
EntryLog
Etlaq Advanced Technologies Company
Evenesis
Evitech
Filazero
FOORIR
FootfallCam
Fujitsu Japan
G Element Pte Ltd
Gateway Ticketing Systems
Genetec
GeoVision
Get In
Getin
GHD
GInIEm
Graymatics
GSI Indonesia
Gtd
Halo Solutions
Hanwha Vision
Hikvision
Howler
i2V Systems
IBBVision
InControl
Infinity Solution
inq.
Insentry
Intelbras
Intellitix
IntelliVIX Co., Ltd.

Table 422 - continued

Company
intuVision, Inc.
iOmniscient
Ipsotek Ltd
Irisity
Isarsoft
ISS
Itchat Brasil
ITTI
JOINLIST
Keenfinity Group
Kipacha Technologies Limited
Knowledge Resources Africa
KSI Vision
LalinSoft
Lauretta AI
LCP Buildsoft Technology (M) Sdn Bhd
Lyntari
Macroscop
Mais Fluxo
March Networks
Master Works
Meshh
Milestone Systems
Monuv
Motorola Solutions
Mott MacDonald
NEC Corporation
NeuroCore
Niveway
Noctra
Nodeflux
Nokia

Table 422 - continued

Company
Nommon Solutions and Technologies, S.L.
Numia
Oasys
OnePlan
Outsight
Pangiam
Pogen
Poken Perú
Presight
Proline
PTV Group
purematic
Qanty
QLess
Qmatic
Qme Solutions
Qtrac, Inc.
Rading Technologies
Registel
RetailNext
RTSoft
Samco
Saudi Company for Artificial Intelligence (SCAI)
Savannah Simulations AG
SCE INNOVATION
Scylla
Securex Agencies Ltd
Secutel Technologies
SenSen Networks Limited
SenseTime
SenseTime MEA
SenSource

Table 422 - continued

Company
Senstar
Shanghai Suishenxing Zhihui Jiaotong Keji Youxian Gongsi
Shobunsha Holdings
Sidesys
SITA
Skiplino
SMS Storetraffic
solutions by stc
Somayar
Sorveo
ST Engineering
Staqu Technologies
Sumato ID
Swiss Systems
SYRATE SARL
Tahakom
TallyFi
Tapp
Tapway
TAV Technologies
Technical Arrow Technology Company
Technis SA
TechnoAware
Thunderhead Engineering
Traf-Sys Inc.
Trakomatic
TRASSIR
Two-i
uCrowds B.V.
Urbix Technologies
V-Count
V3 Smart Tech

Table 422 - continued

Company
VACAN
Vaidio
Vectorworks, Inc.
Vemco Group
Veovo
Verizon
Videonetics
Videtics
viisights
Virelta
Viziosense
VOCORD
WaitTime
WAKEB
Wavetec
Wintics
Xovis
XXII
ZeroQ
株式会社アスペリア

Sources & Evidence

1. Improving flow, comfort, and safety: LEGION crowd and pedestrian simulation software explained
   - Company verification: Bentley's October xx.xx 2026 product article confirms continuing commercial activity for LEGION pedestrian and crowd-simulation software.
   - Company verification: The article identifies populated-space capacity, circulation, crowding, and operational planning as LEGION applications.
2. About Oasys | Engineering software for the built environment
   - Company verification: Oasys identifies itself as Arup's commercial engineering-software business.
   - Company verification: Its current company description expressly includes pedestrian-simulation software and confirms that Oasys remains part of Arup.
3. MassMotion - Arup
   - Company verification: Arup identifies MassMotion as software developed in-house and used in its people-movement work.
   - Company verification: The company describes MassMotion applications involving airports, public spaces, and cultural events, supporting a market-specific commercial role beyond a generic software capability.

4. Company Profile | About PTV
   - Company verification: PTV's company profile identifies an operating software business specializing in transportation planning, simulation, and real-time management.
   - Company verification: PTV states that Bridgepoint acquired a majority stake in January 2022 and that PTV Group and Econolite have operated under the Umovity brand since 2023.
   - Company verification: The profile supports retaining PTV Group at its operating-supplier level rather than adding Umovity as another representation of its software portfolio.
5. About Us
   - Company verification: Thunderhead's official company page identifies Thunderhead Engineering Consultants, Inc. as its software-development entity.
   - Company verification: The page provides its Manhattan, Kansas business address and commercial sales contact.
6. Pathfinder | Crowd Movement Simulation and Egress Software
   - Company verification: Thunderhead's current Pathfinder catalog advertises version xx.xx and commercial purchasing and trial access.
   - Company verification: The product expressly addresses event entry, queues, pedestrian circulation, and crowd-movement planning.
   - Company verification: The catalog includes an attributed customer testimonial from Performance Based Fire Protection Engineering, supporting an established professional software role.
   - Company verification: Thunderhead Engineering offers Pathfinder with commercial pricing and trial options.
   - Company verification: Pathfinder is marketed for pedestrian circulation, event entry and queues, emergency preparedness, and egress analysis.
7. General terms and conditions
   - Company verification: The contractual terms identify uCrowds B.V., its Utrecht registered office, and Dutch Chamber of Commerce registration number.
   - Company verification: The terms identify uCrowds as supplier and licensor of crowd-simulation software and establish subscription-based commercial contracting.
8. BriefCam video analytics software | Milestone Systems
   - Company verification: Milestone's current BriefCam catalog establishes a marketed software portfolio with real-time occupancy and crowd-level monitoring.
   - Company verification: BriefCam is presented within Milestone's product portfolio and integrates with video-management platforms, including XProtect.
   - Company verification: This supplies the substantive current crowd-product support missing from the captured release-index evidence.
9. Who We Are - Ipsotek Ltd
   - Company verification: Ipsotek's current company description identifies it as part of Eviden and as the supplier supporting Eviden's Vision AI offering.
   - Company verification: The page identifies current Ipsotek-branded software products and an attributed London Eye customer relationship.
   - Company verification: Ipsotek states that it is part of Eviden.
   - Company verification: Its company description includes crowd management within its video-analytics offering.
10. Atos completes acquisition of Ipsotek - Ipsotek Ltd
    - Company verification: The June xx.xx 2021 transaction announcement states that Atos completed its acquisition of Ipsotek.
    - Company verification: Together with Ipsotek's current Eviden attribution, the announcement supports an operating-subsidiary reporting treatment rather than an independent-parent assumption.

11. Imprint | Xovis
    - Company verification: Xovis' legal notice identifies Xovis AG, its Swiss headquarters, and its business identification number.
    - Company verification: The notice connects the Xovis market-facing identity to a named legal supplier.
12. About Us - Veovo
    - Company verification: Veovo's company page identifies it as a subsidiary of publicly traded Gentrack Group Limited.
    - Company verification: The page describes Veovo as an operating airport-product and technology business with international offices.
    - Company verification: This resolves the captured parent-company attribution gap without introducing a separate Gentrack row.
13. Investor Information | accesso
    - Company verification: The investor page, updated October xx.xx 2026, identifies accesso Technology Group plc and its English company registration.
    - Company verification: accesso states that it generates revenue from virtual-queuing solutions as well as its other attraction technologies.
    - Company verification: The page identifies active international subsidiaries, supporting group-level reporting of the LoQueue portfolio.
14. Impressum - accu:rate
    - Company verification: accu:rate's imprint identifies accu:rate GmbH, its Munich address, and its commercial-register details.
    - Company verification: This resolves the legal identity behind the captured crowd:it license-purchasing and integration evidence.
15. PARTNER PROGRAM PEDESTRIAN DYNAMICS® - SERVICE PARTNERS
    - Company verification: InControl's Pedestrian Dynamics service-partner document explicitly describes third-party software-license sales and associated commercial partner arrangements.
    - Company verification: The document supports external commercialization of Pedestrian Dynamics, although its date and current legal contracting entity remain unresolved.
16. SIMWALK - Pedestrian Simulation for Transport, Aviation and Architecture
    - Company verification: The SimWalk contact page continues to attribute the business to Savannah Simulations AG.
    - Company verification: The undated page offers commercial contact for SimWalk products and services but does not independently establish current registration status or paid availability.
17. With the acquisition of Videtics, Technis lays the foundation stone for a sovereign European group in AI applied to physical spaces
    - Company verification: Technis' February xx.xx 2025 announcement identifies its acquisition of Videtics and integration of Videtics' video-analysis and flow-optimization capabilities.
    - Company verification: The announcement establishes a material ownership and reporting-level relationship between the two staged identities.
    - Company verification: The acquisition announcement identifies Videtics as the acquired business joining Technis.
    - Company verification: Videtics therefore cannot be assumed to represent an independent economic competitor alongside a Technis portfolio that includes its technology.
18. Videtics platform
    - Company verification: Technis currently markets the Videtics platform within its own commercial portfolio.
    - Company verification: The product page identifies Technis SA and describes crowd-related analytics, alerts, and dashboards, corroborating current portfolio integration.
    - Company verification: Videtics remains a marketed platform name on Technis' commercial site.
    - Company verification: Continued product availability does not establish an independent Videtics supplier representation separate from Technis.

19. SCAI and Publicis Groupe Middle East collaborate to drive digital transformation in the Kingdom
    - Company verification: SCAI's February xx.xx 2024 corporate announcement identifies Saudi Company for Artificial Intelligence as wholly owned by the Public Investment Fund.
    - Company verification: The statement supports ownership attribution for the operating supplier behind the captured SCAI Motion product.
20. Video Analytics software company for customized and integrated solutions
    - Company verification: AllGoVision's current company page describes its commercial video-analytics software business.
    - Company verification: The page corroborates continuing supplier activity alongside the captured named crowd-management product and legal-entity documentation.
21. Security Planning in OnePlan - OnePlan Events
    - Company verification: OnePlan's current security-planning page explicitly markets crowd-capacity and flow-control planning functions.
    - Company verification: The page provides commercial access and an attributed event-security customer example, resolving the earlier absence of inspected crowd-specific product content.
22. Contact Us
    - Company verification: Lyntari's contact page provides a Santa Monica, California business-contact address and advertises demonstrations and commercial engagement.
    - Company verification: The page describes predictive venue intelligence but does not establish the registered contracting entity or paid deployments.
23. SenseTime Joins HKSAR Delegation’s Visit to Saudi Arabia
    - Company verification: SenseTime's corporate announcement identifies SenseTime MEA as a joint venture with Saudi Arabia's Public Investment Fund.
    - Company verification: The relationship requires reconciliation before group and regional crowd-software activity can be attributed independently.
    - Company verification: The official announcement establishes a SenseTime-PIF joint-venture relationship behind the SenseTime MEA name.
    - Company verification: It does not establish independent current crowd-software licensing or nonoverlapping competitive economics.
24. In just twelve months, we have built real momentum.
    - Company verification: Keenfinity's July 2026 corporate statement identifies July xx.xx 2025 as its independence date following the Bosch Group spin-off.
    - Company verification: This is a material supplier-attribution change for historical Bosch security-product evidence; it does not establish Bosch Sicherheitssysteme GmbH as the present Intelligent Insights licensor.
    - Company verification: Keenfinity's stated separation from Bosch Group is a material qualification on attributing historical Bosch security-product offerings to Bosch Sicherheitssysteme GmbH today; the statement does not establish that protected entity as the current Intelligent Insights supplier.
    - Company verification: Keenfinity's July 2026 statement dates its independence from Bosch Group to July xx.xx 2025 and identifies a subsequent holding structure with a video-systems business.
    - Company verification: This establishes a separate business representation for the transferred portfolio, without identifying every product's current licensor.
25. Introduction of Intelligent Insights | Keenfinity Group I North America
    - Company verification: Keenfinity hosts the Intelligent Insights commercial announcement originally describing a Bosch software offering.
    - Company verification: The current hosting and historical product attribution do not resolve the exact present owner, licensor, or contracting entity for the staged Bosch identity.

26. CLEAR Acquires Virtual Queuing Company Whyline :: Clear Secure, Inc. (YOU)
    - Company verification: CLEAR's January xx.xx 2022 announcement states that it acquired Whyline.
    - Company verification: The announcement identifies Whyline's virtual-queuing technology and named airport and other customer relationships.
    - Company verification: This resolves historical ownership of the Whyline lead but does not establish current product packaging or availability.
27. BigBear.ai Completes Pangiam Acquisition: Establishes Combined Company as Breakout Leader in Vision AI for National Security, Supply Chain Management, and Digital Identity
    - Company verification: BigBear.ai's March xx.xx 2024 announcement states that its acquisition of Pangiam Intermediate Holdings, LLC was completed.
    - Company verification: The announcement describes Pangiam as a BigBear.ai company serving travel, trade, and digital-identity customers.
    - Company verification: The transaction record does not establish continuing crowd-specific virtual-queuing products or contracts.
28. LEGION | Bentley Systems
    - Company verification: Bentley markets LEGION as pedestrian modeling, simulation, and analysis software.
    - Company verification: The offering addresses crowd management, populated-space planning, safety, and operational scenarios.
29. MassMotion | pedestrian simulation and crowd modelling software
    - Company verification: Oasys offers MassMotion pedestrian simulation and crowd modeling software.
    - Company verification: Named buyer applications include transport hubs, stadiums, events, attractions, and public spaces.
30. Pedestrian simulation software PTV Viswalk
    - Company verification: PTV offers Viswalk pedestrian simulation software.
    - Company verification: The product addresses crowd density, passenger flow, event queues, congestion, and evacuation planning.
31. Pedestrian Library - AnyLogic Simulation Software
    - Company verification: AnyLogic offers a Pedestrian Library within its simulation software.
    - Company verification: The commercial page addresses crowd movement, congestion, queues, evacuation scenarios, and shared-space performance.
32. Resources - InControl
    - Company verification: InControl maintains official resources for the named Pedestrian Dynamics software alongside its other software resources.
    - Company verification: The inspected page establishes a product-support relationship, not current external licensing terms.
33. SimCrowds
    - Company verification: uCrowds B.V. offers SimCrowds for crowd-management experts.
    - Company verification: The product page provides subscription and trial arrangements and identifies the supplier as uCrowds B.V.
34. SimWalk PRO: Pedestrian Simulation for Urban Planning, Architecture and Evacuation
    - Company verification: The official SimWalk PRO document identifies Savannah Simulations AG as the supplier.
    - Company verification: SimWalk PRO is described as software for pedestrian flow and crowd analysis, with related modeling services.
35. Beonic and CrowdVision Accelerate Computer Vision Capabilities
    - Company verification: Beonic describes its acquisition of CrowdVision.
    - Company verification: The narrative describes CrowdVision as a video SaaS offering delivering real-time pedestrian information for venue and transport operations.

36. WaitTime Products and Services
    - Company verification: WaitTime markets software providing live crowd movement, density, occupancy, and queue information.
    - Company verification: Its offering includes an operations dashboard and guest-facing information integrations.
37. Airport Terminal Operations: Aviation | NEC
    - Company verification: NEC's airport portfolio includes a named Congestion Management Solution.
    - Company verification: The offering visualizes crowd density and pedestrian flow and provides crowd-related alerts for airport operations.
38. New beginnings for Milestone
    - Company verification: Milestone Systems' March xx.xx 2025 article reports acquisition of BriefCam and Arcules during 2024.
    - Company verification: Milestone describes the combined offering as including video management software, video analytics, and surveillance as a service.
39. Crowd Management - Ipsotek Ltd
    - Company verification: Ipsotek markets crowd-management solutions for venues, public spaces, and capacity-constrained areas.
    - Company verification: Named functions include crowd counting, overcrowding detection, heatmaps, queue management, and reporting.
40. Measuring Crowds at Indoor and Outdoor Events | Xovis
    - Company verification: Xovis markets crowd measurement and people-flow data for indoor and outdoor events.
    - Company verification: Its event offering supports occupancy visibility, crowd-flow decisions, and prevention of overcrowding, while emphasizing sensor-based delivery.
41. Crowd estimation: Keeping count with video analytics
    - Company verification: Genetec identifies crowd estimation as a built-in video-analytics tool in Security Center.
    - Company verification: The offering includes crowd counts, occupancy notifications, dashboards, historical information, and event-triggered actions.
42. Video security in the stadium thanks to Dallmeier
    - Company verification: Dallmeier markets stadium solutions combining Panomera systems with Hemisphere software modules.
    - Company verification: The offering addresses crowd-flow monitoring, congestion visibility, incident management, and venue operations.
43. Airport Operations Software | Intelligent Airport Platform | Veovo
    - Company verification: Veovo's airport software platform includes Flow Management and Queue Management.
    - Company verification: The platform connects people-flow information, predictions, and operational decisions and offers cloud and on-premises deployment options.
44. CVG Airport adopts Veovo's Curb-to-Flight passenger flow management for data-driven passenger enhancements
    - Company verification: CVG Airport announced adoption of Veovo's airport-wide passenger-flow technology on May xx.xx 2021.
    - Company verification: The airport describes using live and historical passenger occupancy and movement information for operational decisions and crowding reduction.
45. SITA | SITA Passenger Intelligent Insights
    - Company verification: SITA markets Passenger Intelligent Insights as an analytical platform for airports and airlines.
    - Company verification: The offering addresses passenger movements, dwell time, touchpoint performance, and reduction of journey bottlenecks.

46. Crowd Connected Platform
    - Company verification: Crowd Connected offers an indoor and outdoor location platform with analytics and integrations.
    - Company verification: The platform includes near-real-time situational heatmaps, device counts, dwell-time reporting, and data outputs.
47. How does it work - Crowdscan
    - Company verification: CrowdScan describes commercial services covering crowd-density counting, analytics, prediction, and integrated management.
    - Company verification: The offering includes cloud-based processing and visualization for crowd-management decisions.
48. DSS Professional Datasheet
    - Company verification: Dahua's DSS Professional xx.xx.xx.xx software datasheet lists people-counting analytics and crowd-distribution statistics.
    - Company verification: The record establishes crowd-related analytics within a named software platform.
49. AI Video Analytics for Hospitality Security and Operations
    - Company verification: Videonetics markets AI-enabled video analytics for hospitality operations.
    - Company verification: Its offering includes occupancy, queue length, people movement, crowd formation, and crowd-safety analytics.
50. Evitech - Vidéo surveillance intelligente - Lynx
    - Company verification: Evitech markets Lynx as software for crowd management through video-content analysis.
    - Company verification: The offering addresses crowd counts, density, flow-related incidents, alerts, and historical statistics.
51. Crowd Dynamics | Crowd Modelling and Simulation | LEGION
    - Company verification: Crowd Dynamics describes its Myriad X Software Suite within its crowd-modeling service.
    - Company verification: The record establishes a named software-related capability but does not establish external licensing.
52. CrowdSafe | crowddynamics
    - Company verification: Crowd Dynamics describes CrowdSafe as a methodology and software solution for planning and managing large event crowds.
    - Company verification: The page identifies police, local authorities, and private-sector stakeholders as intended users without establishing current commercial deployment.
53. Occupancy Monitoring - Cloud-Based - Cisco Spaces
    - Company verification: Cisco Spaces markets real-time occupancy-monitoring applications.
    - Company verification: The stated use includes identifying hotspots and avoiding overcrowding in facilities and venues.
54. Manchester City Collaborates with Cisco to Deploy Crowd Intelligence Solution, WaitTime
    - Company verification: Cisco announced its collaboration with Manchester City to deploy WaitTime at Etihad Stadium on December xx.xx 2022.
    - Company verification: The announcement establishes Cisco's ecosystem role in a specific crowd-intelligence deployment.
    - Company verification: The dated deployment announcement identifies WaitTime as the crowd-intelligence technology used at Etihad Stadium.
    - Company verification: The reported application concerns crowd density, movement, and concourse congestion.

55. Crowd Analytics and Management Technology | Verizon
    - Company verification: Verizon markets 5G Edge Crowd Analytics as a SaaS solution combining applications, devices, and support services.
    - Company verification: The offering provides crowd-flow, queue, occupancy, density, and visitor-movement insights.
56. intuVision VA Event - Crowd Density
    - Company verification: The official product page identifies Crowd Density as an available intuVision VA Security module function for monitoring crowd levels and generating alerts.
    - Company verification: The page identifies intuVision, Inc. in its copyright notice.
57. intuVision VA in Action
    - Company verification: The official commercial demonstration page lists intuVision crowd-density and queue-related offerings and a Woburn, Massachusetts business address.
58. People Counting Software & Analytics | SenSource
    - Company verification: SenSource markets Vea people-counting software with real-time occupancy monitoring, traffic forecasts, dashboards, and customer-journey analytics.
    - Company verification: The product page describes SaaS subscription support and provides a Youngstown, Ohio address.
59. Crowd Detection - Occupancy Detection - Senstar
    - Company verification: Senstar markets Symphony Crowd Detection for real-time capacity and occupancy estimation, overcrowding identification, and staff notifications.
    - Company verification: The page lists Senstar corporate headquarters in Ottawa, Ontario, Canada.
60. Vaidio for Stadiums
    - Company verification: Vaidio markets stadium software functions covering crowd direction, live occupancy, concession queues, and operational staffing decisions.
61. IronYun Launches 9th Generation AI Vision Platform, Rebrands as Vaidio
    - Company verification: The March xx.xx 2025 company announcement states that IronYun is rebranding as Vaidio.
    - Company verification: The announcement identifies Stamford, Connecticut, as Vaidio's headquarters.
62. Stadium WiFi Marketing and Data Analytics Solution
    - Company verification: Aislelabs markets stadium analytics for visit counts, dwell times, crowd movement, and movement between gates, concourses, concessions, and seating zones.
    - Company verification: The page presents commercial pricing tiers and demo access.
63. T.M.A.S. People Counting Software & Analytics | SMS Storetraffic
    - Company verification: SMS Storetraffic advertises T.M.A.S. as its people-counting software and analytics platform.
64. Traffic Flow Analysis | Scylla
    - Company verification: Scylla markets Traffic Flow Analysis with people counting, occupancy monitoring, crowd and queue management, and congestion-related reporting.
65. Occupancy | Product Brief | RetailNext
    - Company verification: RetailNext markets Occupancy Tracking & Compliance with real-time occupancy visibility, thresholds, reporting, alerts, and integrations with queue and signage tools.
66. CountWise People Counting Solutions: General Overview
    - Company verification: A company-issued CountWise brochure hosted by Herbert identifies CountWise people-counting solutions and application software for analysis and alerts.
    - Company verification: The historical brochure does not establish present commercial availability.
67. More space, less waste: 6 ways occupancy sensors change the game
    - Company verification: Density's official commercial article describes occupancy-data applications for monitoring airport-lounge crowd levels and showing users how busy common spaces are.
    - Company verification: The article supports an occupancy-data adjacency, not a named regional deployment or a dedicated crowd-management license.

68. Queue Management - Frontlion
    - Company verification: Frontlion markets a queue-management platform.
    - Company verification: The page's brand-transition notice identifies Frontlion as a brand of Qtrac, Inc.
69. Terms of Service - Frontlion
    - Company verification: Official terms effective August xx.xx 2026 identify Qtrac, Inc. as the company providing services under the Frontlion brand.
70. Upgrade Your Shooting Range Scheduling System Post-COVID
    - Company verification: QLess explicitly markets its virtual-queue and appointment software as a crowd-management solution for physical facilities.
    - Company verification: The offering allows visitors to wait remotely and receive queue-position and wait-time communications.
71. Pogen occupancy
    - Company verification: Pogen markets Pogen Occupancy for monitoring and limiting occupancy, communicating admission availability, and providing platform alerts.
    - Company verification: Pogen Occupancy is marketed as a system for monitoring and limiting the number of people within a location, with occupancy visibility from connected devices.
72. Conteo de personas: optimiza tu tienda hacia 2026
    - Company verification: Getin's March 2026 commercial article describes real-time saturation and occupancy management for physical retail in Mexico.
73. Getin arranca 2023 con ronda de inversión de US $750K para impulsar al retail
    - Company verification: Getin's January 2023 announcement identifies it as a Mexican startup and describes private investment received in December 2022.
    - Company verification: The announcement describes its platform as analyzing occupancy, density, and dwell in physical stores.
74. Aetherix - Visión por computadora y mantenimiento predictivo
    - Company verification: Aetherix's single-page commercial catalog markets EventMotion for event-aisle traffic, dwell, density, and interactive heatmap reporting.
    - Company verification: The business identifies its location as Monterrey, Nuevo León, Mexico, and provides a quotation contact path.
75. CLICR for Events | You run the event. We prove the count.
    - Company verification: CLICR maintains a specific events-oriented product page.
76. CLICR | Know your crowd. Grow your revenue.
    - Company verification: CLICR's product site advertises synchronized entry and exit counting, live occupancy, multi-area dashboards, and paid plans.
    - Company verification: The site expressly states that displayed venue logos represent pilots, partnerships, or active user testing rather than uniformly established paid deployments.
77. Connect&GO Provides Contactless Solutions for Leisure and Entertainment Properties
    - Company verification: Connect&GO identifies itself as Montreal-based and describes virtual queuing, crowd-capacity dashboards, and zone-level capacity monitoring.
78. Attraction & Theme Parks | Connect&GO
    - Company verification: Connect&GO's attraction-management platform advertises unified ticketing, access control, capacity, staffing, and real-time operational insights.
79. Sports | Optimize Event Flow - Learn More - Intellitix
    - Company verification: Intellitix markets conditional access zones for crowd control and ingress, together with entry-activity and event reporting.
    - Company verification: The page describes North American event activity during 2025.
80. About Intellitix
    - Company verification: Intellitix identifies its founding location as Montreal, Canada.
    - Company verification: The company describes live dashboards for entry flow and an integrated access, payments, and event-insights platform.

81. #TuesdayTalks on May 26, 2020: Configuring Capacity Management, Holds & Pass Required Tickets
    - Company verification: Gateway Ticketing Systems' May xx.xx 2020 announcement identifies capacity-management functionality in Galaxy.
    - Company verification: The page lists a Gilbertsville, Pennsylvania business address; it does not by itself establish present live crowd-flow functionality.
82. Business Intelligence, Insights and Video Analytics | March Networks
    - Company verification: March Networks markets Searchlight Cloud business intelligence and Smart Rules for real-time alerts involving customer occupancy changes and speed of service.
    - Company verification: The page lists corporate headquarters in Ottawa, Ontario, Canada.
83. GSOC/NOC - Solutions - Actuate
    - Company verification: Actuate markets AI video analytics for security operations centers that identifies unusual crowd behavior across locations.
84. Video Analytics Software & Solutions | AI-Powered Platform
    - Company verification: The official Avigilon portfolio markets crowd detection and occupancy management for people-flow monitoring.
    - Company verification: The page identifies Motorola Solutions, Inc. in its corporate copyright notice.
85. People Counters for Concerts and Events by TallyFi
    - Company verification: TallyFi identifies itself as a Waterloo, Canada company supplying people-counting hardware and software services.
    - Company verification: Its event offering includes synchronized venue counts, crowd-flow records, an online dashboard, and subscription plans.
86. Embross Signs Contract with Multiple Greenland Airports
    - Company verification: The May xx.xx 2023 announcement names Embross North America Ltd. and a long-term contract with Nuuk International, Ilulissat, and Qaqortoq airports in Greenland.
    - Company verification: The announced portfolio includes a cloud-based CUPPS platform and passenger-flow data at passenger transaction points; the announcement does not establish current deployment.
87. Advanced Analysis of Video - Digifort
    - Company verification: Digifort markets a licensed video-analytics module covering people counts, movement direction, and agglomeration-related alerts.
88. Digifort
    - Company verification: Digifort identifies itself as a video-surveillance software business with corporate headquarters in São Caetano do Sul, São Paulo.
89. Defense IA e Defense IA Lite | Intelbras
    - Company verification: Intelbras markets Defense IA with people-counting, heatmap, and real-time people-flow analytics.
    - Company verification: The commercial page describes acquisition of licensed versions through distributors.
90. Control de Aforo y Conteo de Personas | Elipse Chile
    - Company verification: Elipse offers a platform combining people counts, live occupancy dashboards, threshold alerts, and historical reporting.
    - Company verification: The offering explicitly addresses facilities in Chile.
91. Sociedad Comercial Elipse | Tecnología Industrial en Chile
    - Company verification: Elipse identifies itself as a Chilean company with proprietary development and integrated software, hardware, and implementation capabilities.
92. Conteo de personas con IA y tus cámaras | KSI Vision
    - Company verification: KSI Vision markets software that converts existing CCTV video into real-time people counts and operational reporting.
    - Company verification: Its product catalog includes queue analysis, saturation monitoring, heatmaps, and dwell-time analytics.

93. PAX Flow y Analítica en Tiempo Real para Aeropuertos | KSI Vision
    - Company verification: KSI Vision maintains a specific commercial page for airport passenger-flow and real-time analytics.
94. Regiscenter: conteo de personas y aforo | Registel
    - Company verification: Registel markets Regiscenter for occupancy and people-flow information in terminals and high-traffic public spaces.
    - Company verification: The offering addresses demand peaks and flow patterns by area and time.
95. RegisData: plataforma de datos de transporte | Registel
    - Company verification: Registel publicly offers RegisData as a transport-data platform, establishing a software-platform role alongside its counting products.
96. Contagem de pessoas e veículos com câmeras e IA | Monuv
    - Company verification: Monuv offers camera-based people-flow counting, hourly reporting, heatmaps, and data integration.
    - Company verification: The commercial page presents recurring subscription contracting and shopping-center occupancy and operational applications.
97. Software de gestión de filas en tiempo real
    - Company verification: ZeroQ markets a queue-management software suite combining branch operations, real-time analytics, and virtual tickets.
    - Company verification: The suite explicitly positions virtual tickets as a means of reducing physical crowding.
98. Poken Perú
    - Company verification: Poken Perú advertises a software-enabled people-counting and capacity-control service.
    - Company verification: The company states that a Tecbrain alliance supports its software-data service, establishing a channel or integrated-service role rather than proven software ownership.
99. Enova Apps - Enova
    - Company verification: Enova Apps identifies mobile and web software development as its business and lists capacity-control projects among its private-sector work.
100. Software de gestión para boliches y discotecas | Noctra Argentina
    - Company verification: Noctra advertises software for Argentine nightclubs and discotheques, including a live occupancy view and event-entry management.
    - Company verification: The commercial landing page offers subscription plans; displayed demonstration figures do not establish customer adoption.
101. Fila Fácil | Itchat Brasil
    - Company verification: Itchat Brasil markets Fila Fácil for digital queue management and explicitly describes avoiding physical crowding.
    - Company verification: The product page identifies a Brazilian business address and company registration number.
102. Filazero | Sistema de gestão de filas com previsão em tempo real
    - Company verification: Filazero markets queue-management software with real-time waiting predictions and physical-queue entry channels.
    - Company verification: Its commercial positioning includes allowing customers to wait away from a crowded corridor or continue shopping.
103. Qanty | Software de Agendamento e Gestão de Filas
    - Company verification: Qanty markets a cloud queue-management platform combining physical tickets, virtual waiting lists, notifications, and operational dashboards.
    - Company verification: Its Portuguese-language offering describes avoiding physical queues; it does not establish a specific local contracting entity.

104. Bingo LR | Especial Halloween | Guayaquil - Ecuador
    - Company verification: Bingo LR describes Access Control LR for event admission and real-time capacity management.
    - Company verification: The record labels the offering forthcoming, rather than establishing marketed availability.
105. Argentine government publication - SMARTCROWD 2 28 2 registration entry
    - Company verification: A historical Argentine government publication lists URBIX TECHNOLOGIES SA as holder of the computer program SMARTCROWD xx.xx xx.xx xx.xx.
    - Company verification: The registration establishes historical ownership, not current licensing or operating status.
106. tPass: Sistema de venta de Tickets online - GInIEm - Consultoría, Desarrollo de Software y Staffing
    - Company verification: GInIEm maintains a specific commercial record for its tPass online event-ticketing system.
107. Dingo AI Solutions - Control de Acceso Inteligente · Costa Rica
    - Company verification: Dingo AI Solutions advertises a Costa Rica-facing access platform with capacity-control and zone-access functions for social clubs.
    - Company verification: Its product presentation combines software with access hardware and related services.
108. Software para negocios turísticos - Niveway
    - Company verification: Niveway's solutions catalog advertises real-time capacity control and admission-ticket validation for attractions.
    - Company verification: The offering is broader tourism software; actual assigned-country operations are not established by the page.
109. Smart City | A.I. Tech srl
    - Company verification: A.I. Tech's Smart City catalog offers AI-CROWD-DEEP and AI-CROWD-COUNTING for crowded public spaces, venues, and passenger-flow monitoring.
110. AI-CROWD-DEEP: crowd estimation based on Deep Learning | A.I. Tech srl
    - Company verification: The March xx.xx 2020 product announcement identifies A.I. Tech's headquarters in Salerno and announces AI-CROWD-DEEP commercial availability.
111. VTrack - TechnoAware
    - Company verification: TechnoAware markets VTrack as modular video-analytics software with flow counting, area counting, occupancy-rate, and hot-zone functions.
112. Contacts - TechnoAware
    - Company verification: The official contact record connects the TechnoAware supplier identity to an Italian business presence.
113. Sistema automático de control de aforo en tiempo real | Dinycon
    - Company verification: Dinycon advertises real-time capacity-control systems for managing occupancy in physical spaces.
114. Empresa de sistemas de conteo y control de aforo | Dinycon
    - Company verification: Dinycon's company page identifies its systems-integration business in people mobility, counting, and capacity control.
115. Nommon | Population Insights
    - Company verification: Population Insights provides dynamic population maps, visitor-footfall and presence indicators through a licensed API platform or bespoke projects.
    - Company verification: The product page identifies Nommon Solutions and Technologies, S.L. and its Madrid business contact.
116. Privacy policy - Nommon
    - Company verification: Nommon's privacy record identifies Nommon Solutions and Technologies SL as the responsible company based in Madrid, Spain.

117. Affluences : découvrez nos différentes offres
    - Company verification: Affluences offers licensed access to its SaaS crowd-flow management software, alongside integrated counting hardware.
118. Mentions légales - Affluences
    - Company verification: The legal notice identifies AFFLUENCES SAS, registered in Paris, and describes its crowd measurement, analysis, waiting-time, and occupancy business.
119. Video Analytics for Transport Operators | Isarsoft Perception
    - Company verification: Isarsoft markets Perception video analytics for public-transport passenger counting, crowd management, and passenger-flow analysis.
120. Airport Passenger Analytics and Passenger Flow | Ariadne
    - Company verification: Ariadne offers airport passenger analytics and passenger-flow capabilities.
    - Company verification: The offering's company information identifies Ariadne Maps GmbH in Munich and a Greek business presence.
121. Imprint - Ariadne
    - Company verification: The imprint identifies Ariadne Maps GmbH as the German business behind the Ariadne offering.
122. ADP Group Testimonial at CDG | Insights
    - Company verification: Outsight's Groupe ADP testimonial describes its software-supported passenger and baggage-flow monitoring at Paris-Charles de Gaulle.
123. Vemco_VemSpace _Occupancy Management_Brochure
    - Company verification: Vemco Group's VemSpace brochure advertises occupancy-management software and identifies a Denmark office.
124. IRIS+ R2 2024 | IRIS Irisity
    - Company verification: Irisity's 2024 IRIS+ R2 release describes crowd-density events and real-time crowd-statistics functionality.
125. AXIS Object Analytics | Axis Communications
    - Company verification: Axis offers Object Analytics for occupancy, visitor counts, queue management, crowd-density insights, and movement flow.
    - Company verification: The application is preinstalled at no extra cost on compatible devices, qualifying its software economics as bundled.
126. Product - Crowd management
    - Company verification: Technis markets crowd monitoring through Technis Spaces, including concentration mapping, congestion information, alerts, and dashboards.
    - Company verification: The page identifies Technis SA in Lausanne and a French business presence, and states a Videtics integration.
127. PRODUCT
    - Company verification: XXII markets CORE as software combining physical-space analytics dashboards, events, alerts, and flow-management applications.
128. VizioCrowd | Viziosense
    - Company verification: Viziosense markets VizioCrowd for measuring people and pedestrian density in crowded environments.
    - Company verification: The supplier reports French station and large-event applications; these are vendor claims, not independently verified deployment totals.
129. Public Eye - Open Source Crowd Management Solution - Tapp
    - Company verification: Tapp's March xx.xx 2021 Public Eye project page describes crowd-count, density, direction, and speed dashboards in Amsterdam.
    - Company verification: The page describes subscription access and freely available open-source software, leaving current commercial packaging unresolved.

130. How do we measure | CityTraffic
    - Company verification: CityTraffic advertises subscription access to its software platform and describes its mobility viewer as usable for real-time crowd management.
    - Company verification: Its stated footfall business includes the Netherlands, Belgium, and Luxembourg.
131. Crowdmanagement Nijmegen LED displays events | Daylight
    - Company verification: Daylight describes scenario software integrated with LED displays for directing event crowd flows in Nijmegen.
132. RTSoft OMGE от ГК РТСофт
    - Company verification: RTSoft's catalog offers RTSoft OMGE software for people counting, movement analysis, and analysis of passage through physical zones.
133. Система VOCORD Tahion - видеонаблюдение и интеллектуальная видеоаналитика любого масштаба
    - Company verification: VOCORD markets Tahion surveillance and video-analytics software and describes public-space applications in Russia and elsewhere.
    - Company verification: This establishes an advertised software role but not separately licensed crowd-flow functionality or current ownership.
134. Модуль распознавания очередей и скоплений людей | ИИ видеоаналитика толпы | AI лаборатория NeuroCore
    - Company verification: NeuroCore advertises a video-analytics module for queues, overloaded zones, crowd accumulation, and visitor-flow statistics.
135. Видеоаналитика для бизнеса Insentry заказать - купить интеллектуальную систему распознавания для бизнеса и производства
    - Company verification: Insentry's Russian-language commercial catalog advertises video analytics covering crowd accumulation, movement against flow, queue analysis, people counts, and heatmaps.
136. Интеллектуальная видеоаналитика TRASSIR
    - Company verification: TRASSIR's commercial analytics portfolio includes Queue Detector and Heat Map on Map for queues and visitor-flow visualization.
137. SHIELD4CROWD - Catalogue of solutions for public space protection and crowd management
    - Company verification: Identifies Munich-based accu:rate and its crowd:it pedestrian-flow software.
    - Company verification: Identifies Paris-based Wintics and describes real-time video crowd/flow analytics.
    - Company verification: Identifies French supplier XXII and its crowd-related software offering.
    - Company verification: Identifies Poznan-based ITTI and PROCeed crisis-training software, with prospective crowd-management use.
138. EntryLog - Effortless Guest List Management
    - Company verification: EntryLog advertises live attendance counts and a paid guest-flow analytics option for event arrivals and entrance usage.
    - Company verification: Its product site identifies a Czech business operator; a separate corporate supplier identity is not established.

139. Digita, CoreGo and Nokia pioneer private 5G solutions to enhance connectivity and safety at major events - Digita
    - Company verification: Digita's February xx.xx 2026 announcement identifies Digita as the private-wireless connectivity participant in an event-operations collaboration with CoreGo and Nokia.
    - Company verification: The collaboration describes predictive crowd management but does not establish Digita as an independently licensed crowd-software supplier.
    - Company verification: CoreGo is named in the February xx.xx 2026 collaboration to develop event operations and safer crowd-management capabilities.
    - Company verification: The announcement does not establish CoreGo's precise crowd-software licensing attribution.
    - Company verification: Nokia is named in the collaboration, with RXRM software supporting real-time situational visibility.
    - Company verification: The announcement does not establish a separately marketed Nokia crowd-management analytics product.
140. SCAI - SCAI Motion
    - Company verification: Saudi Company for Artificial Intelligence identifies SCAI Motion as its commercial offering for crowd distribution, occupancy, pedestrian flow, congestion, and queue-related applications.
    - Company verification: The product page advertises local Saudi-hosted cloud deployment and event and sporting-venue use cases.
141. ADNEC Group partners with Presight to implement Pioneering AI-Powered Smart Venue Management within its operations
    - Company verification: Presight announced a March xx.xx 2026 memorandum with ADNEC Group covering ADNEC Centre Abu Dhabi and ADNEC Centre Al Ain.
    - Company verification: The announced relationship includes use of Presight's Intelli platform for visitor management and crowd monitoring; the announcement does not establish completed implementation.
142. Sagr | Crowd Management Platform for Events - Etlaq Company
    - Company verification: The Sagr commercial page identifies Etlaq Advanced Technologies Company in its copyright statement and provides a Riyadh business address.
    - Company verification: Sagr is advertised for participant-flow monitoring, live crowd information, interactive site maps, event communications, and analytics.
143. Services | ArrowTech Saudi Arabia
    - Company verification: Technical Arrow Technology Company advertises crowd-management and access-control systems for Saudi stadiums, events, amusement parks, and other high-traffic venues.
    - Company verification: The offering includes real-time entry and occupancy monitoring and centralized dashboards; the page identifies a Jeddah business address.
144. AI Crowd Analytics Solutions In UAE | People Counting & Queue Monitoring | Samco
    - Company verification: Samco advertises UAE crowd-analytics solutions addressing occupancy, queue lengths, density, visitor flow, and overcrowding alerts.
    - Company verification: Samco describes consultation, solution design, deployment, and ongoing support, establishing an advertised integration role rather than verified ownership of the underlying analytics software.
145. AerWatch® | AerVision Technologies
    - Company verification: AerVision Technologies markets AerWatch as a video-intelligence offering.
    - Company verification: Advertised functions include people-movement insights, heatmaps, crowd-related anomaly detection, and crowd-management applications.
146. People Counting and Crowd Analytics Qatar | AerWatch | QRTD
    - Company verification: QRTD identifies itself as AerVision's value-added distributor in Qatar and advertises AerWatch demonstrations, licensing, and partner support.
    - Company verification: The regional offering covers occupancy, visitor flow, queues, crowd density, and congestion; it does not establish a completed Qatari customer sale.

147. City-V - Ankara Zayıf Akım SCE INNOVATION
    - Company verification: SCE INNOVATION's City-V catalog advertises a real-time crowd-analysis platform for businesses, municipalities, transport-related applications, and public spaces.
    - Company verification: The page presents paid software plans and a Turkish distribution program; advertised availability is not treated as independently verified deployment.
148. DLS Intelligence - IBBVision
    - Company verification: IBBVision's DLS Intelligence page advertises video-intelligence software with crowd analysis, event management, and a web-based dashboard.
    - Company verification: The Turkish-language product record identifies shopping-center crowd analysis as a commercial application; it does not independently establish the supplier's registered legal identity or deployment base.
149. Özellikler · 100+ Yetenek · LalinSoft
    - Company verification: LalinSoft's Turkish-language feature catalog advertises crowd gathering, group formation, movement-direction analysis, and early warnings for dangerous crowding.
    - Company verification: The catalog presents these functions as available across its two product editions; independent commercial adoption is not established.
150. Yapay Zeka Tabanlı Video Analitiği | ALGI
    - Company verification: ALGI's substantive product presentation names Algi Edge and advertises a recurring-payment video-analytics platform.
    - Company verification: The advertised catalog includes crowd analysis, occupancy, heatmaps, and queue-related functions; legal supplier attribution and named customer adoption remain unresolved.
151. Sabeel | Infinity Solution
    - Company verification: The Sabeel product page identifies Infinity Solution and provides an Amman, Jordan business address.
    - Company verification: Sabeel is advertised as a pilgrim-services platform with movement heatmaps, density alerts, location information, and capacity-related analytics.
152. About V-Count - AI People Counting Company Since 2007
    - Company verification: V-Count's corporate record identifies its business as people-counting sensors and visitor-analytics software.
    - Company verification: The record supports a software-and-hardware supplier role, not a software-only revenue assessment.
153. #1 People Counting Systems & Solutions | V-Count
    - Company verification: V-Count advertises BoostBI crowding and queue alerts and VCare live occupancy.
    - Company verification: The product record connects its sensor portfolio to software reporting on occupancy, zones, dwell time, and heatmaps, supporting participation beyond basic footfall measurement.
154. Services | TAV Technologies
    - Company verification: TAV Technologies advertises passenger-flow management among its airport technology services.
    - Company verification: The offering includes real-time passenger movement monitoring, congestion identification, and passenger-flow prediction; the page does not independently establish a named deployment of this specific module.
155. Irisity Annual Report 2022
    - Company verification: Irisity's 2022 annual report includes crowd management within its video-analytics software portfolio.
    - Company verification: The same historical report identifies offices in Israel and the UAE; it does not establish that those offices or product arrangements remain current.
156. Baseer | Master Works
    - Company verification: Master Works maintains a commercial Baseer software portfolio with cloud and on-premises availability.
    - Company verification: The inspected catalog establishes the supplier-product relationship but does not substantiate a current crowd-specific Baseer module.

157. AvidBeam Showcases AI Analytics at Hajj Conference 2025
    - Company verification: AvidBeam maintains an official business announcement concerning its AI video-analytics promotion at Hajj Conference 2025.
    - Company verification: The record supports a regional promotional link, not a verified operational Hajj deployment or current customer count.
158. Queue Management System & Appointment Software | Skiplino
    - Company verification: Skiplino's commercial site identifies queue-management and appointment software.
    - Company verification: This establishes an adjacent software offering but does not by itself verify physical-crowd-control functionality or the current Bahrain contracting entity.
159. Retail - Cathexis
    - Company verification: Cathexis markets CathexisVision software with video analytics expressly addressing retail crowd management.
    - Company verification: The product page identifies an Africa office in South Africa.
160. Retail_2025 | Secutel Physical Security Technology
    - Company verification: Secutel Technologies markets SecuVue cloud analytics for people counting, queue monitoring, and activity heatmaps.
    - Company verification: The record establishes an advertised retail-software offering, not independently verified customer deployment.
161. AvidBeam at FDC Summit 2026: AI Video Analytics in Cairo | AvidBeam
    - Company verification: AvidBeam's September xx.xx 2026 announcement promoted its software portfolio for a September xx.xx-xx.xx event in Cairo.
    - Company verification: The advertised AvidGuard capabilities include crowd-density monitoring; the announcement does not establish attendance or an Egyptian paid deployment.
162. IntelexVision - AI Video Analytics
    - Company verification: IntelexVision directs users to Eluviant as the same team and technology under a new name.
    - Company verification: The inspected site markets video analytics including directional violations and crowd gathering and carries a South African customer testimonial.
    - Company verification: The site identifies Intelex Vision Ltd in its registered-office information.
163. Eluviant: AI Video Intelligence Platform
    - Company verification: The destination identified by IntelexVision presents the current Eluviant AI Video Intelligence Platform identity.
164. Edge AI & IoT - inq.
    - Company verification: inq. markets a Video AI Platform and Retail Analytics offering expressly including crowd management and aisle heatmaps.
    - Company verification: The record provides Johannesburg and Mauritius head-office addresses.
165. EDGE AI et IOT - inq.
    - Company verification: inq.'s Côte d'Ivoire catalog advertises crowd-management video analytics and real-time dashboards.
    - Company verification: The same record provides an Abidjan business address, establishing a local offering and contact path rather than confirmed local sales.
166. Syrate - Plateforme Africaine d'Intelligence Vidéo par IA Agentique
    - Company verification: SYRATE SARL identifies its business location as Dakar, Senegal.
    - Company verification: Its ServEYE platform catalog includes occupancy, queue monitoring, gathering and crowd formation, and public-space crowd applications.
    - Company verification: The site reports an infrastructure deployment in Senegal, without establishing independent corroboration or deployment of specific crowd modules.

167. Qme Solutions
    - Company verification: Qme Solutions advertises a digital queue-management application allowing customers to enter physical service queues before arrival.
    - Company verification: The offering expressly addresses branch traffic flow and identifies a Cairo head office.
168. Digital Event Ticketing in Morocco | E-Ticket Pro - Somayar
    - Company verification: Somayar markets E-Ticket Pro for events in Morocco.
    - Company verification: Its management interface reports attendance velocity and traffic by entrance in real time to support gate staffing and crowd-flow decisions.
169. Ensure everyone is where they're supposed to be with Howler's RFID access control solution | Howler
    - Company verification: Howler advertises RFID access-control software with live reporting of access movements.
    - Company verification: Festival-zone management supports unique and quantity-based access permissions.
170. General Service Terms | Howler
    - Company verification: Howler's service terms associate Howler and Nutickets trading names with one South African event-services supplier.
    - Company verification: The record provides a Johannesburg address and supports avoiding a separate Nutickets alias row.
171. People Counting System | People Counter | FootfallCam
    - Company verification: FootfallCam reports use at Jardin Majorelle in Marrakech to manage crowd flow and prevent overcrowding.
    - Company verification: Its Moroccan catalog identifies Analytic Manager software in a separate local deployment.
    - Company verification: These are supplier-reported deployments, not independent customer confirmations.
172. AI BASED VIDEO ANALYTICS | SEATech Systems
    - Company verification: Egyptian SEATech publicly catalogs i2V video-surveillance software and analytics.
    - Company verification: The catalog includes crowd-formation and occupancy alerts, queue analysis, and people-flow counting, establishing a regional channel representation rather than confirmed sales.
173. Swiss Core | AI Offsite Monitoring Software SA | Swiss Systems
    - Company verification: The inspected Swiss OMS address resolves to Swiss Systems' Swiss Core AI offsite-monitoring software page.
    - Company verification: This supports the current platform-name connection, not confirmation that the previously surfaced crowd functions remain available in the current package.
174. Shopping Mall CCTV: Face Recognition & Live Alerts | Sorveo
    - Company verification: Sorveo's inspected mall catalog states that people counting, occupancy, and queue analytics are not yet available and are on its near-term roadmap.
    - Company verification: Current presence detection is expressly distinguished from counting people.
    - Company verification: The supplier advertises support for malls in Nigeria, South Africa, Kenya, Ghana, Rwanda, and Egypt.
175. Rading Technologies - Enterprise Technology Solutions for Africa
    - Company verification: Rading Technologies advertises AI video analytics including crowd counting, centralized video management, and control-room dashboards.
    - Company verification: The services are presented among emerging capabilities and reference Kenyan business and compliance needs; no specific crowd-software deployment is established.
176. Kipacha Technologies Limited | ICT · Web & App · Solar · Hosting · Kenya
    - Company verification: Kipacha Technologies Limited advertises CCTV analytics including crowd counting within its Kenyan ICT and AI services.
    - Company verification: The record establishes an advertised service capability, not a separately licensed proprietary platform or independently confirmed deployment.

177. Projects - Knowledge Resources Africa
    - Company verification: Knowledge Resources Africa reports designing and implementing a Safe City surveillance and analytics project for an unnamed southwest Nigerian state.
    - Company verification: The reported integration includes crowd detection at public locations such as markets and transit hubs.
    - Company verification: The supplier's project description does not independently establish the buyer, award date, or underlying software ownership.
178. Dynamic Crowd Measurement - Solutions
    - Company verification: Dynamic Crowd Measurement advertises density, movement, and occupancy analytics for events, venues, smart cities, and transport hubs.
179. Measuring the mood of crowds to keep major events safe | Digital Trust Portal
    - Company verification: Sydney Olympic Park Authority identifies DCM as its partner in the Safer Crowded Places pilot.
    - Company verification: The authority describes the activity as a trial using analytics to support crowd safety, not a general commercial rollout.
180. Surveillance Solution - Sensen
    - Company verification: SenSen markets video-analytics software for occupancy monitoring, queue management, crowd analysis, and public-space crowd management.
    - Company verification: The offering page gives a South Melbourne, Australia business address.
181. Pioneering AI-based Video Analytics for Intelligent Cities
    - Company verification: The official-hosted Intel and iOmniscient solution brief identifies iOmniscient's software-based smart-city video analytics and crowd-management applications.
182. AI Powered Crowd Management - Datasheet v4.3
    - Company verification: The July 2021 crowd-management datasheet identifies AllGoVision Technologies Private Limited in Bangalore, India.
    - Company verification: It describes commercial software for crowd counts, overcrowding alerts, crowd-flow analysis, and counterflow detection.
183. Video Analytics Solution - AllGoVision.com
    - Company verification: AllGoVision's business page identifies Bangalore headquarters and markets crowd management within its video-analytics software portfolio.
184. Event Management
    - Company verification: Awiros markets an event-management platform with crowd estimation, crowd-inflow analytics, and operational dashboards.
    - Company verification: The page identifies Awiros as a registered trademark of Awidit Systems Pvt. Ltd.
185. Contact Us
    - Company verification: Awiros provides sales contact details and identifies a Gurugram headquarters address.
186. How Staqu's 'Jarvis' is securing RCB's home ground for crowd control - BusinessToday
    - Company verification: A March xx.xx 2026 report records an RCB partnership with Staqu Technologies involving JARVIS analytics for crowd control at M. Chinnaswamy Stadium.
    - Company verification: The report corroborates a dated engagement announcement, not the current status or scale of all subsequent operations.
187. Products | Trakomatic
    - Company verification: Trakomatic's product catalog identifies OCrowd and its Insights Portal within its visitor-behavior technology offering.
    - Company verification: The catalog describes cloud and on-premises processing options.
188. Shopper Analytics & Footfall Counting System | Trakomatic
    - Company verification: Trakomatic's detailed offering page advertises queue and waiting-time monitoring, occupancy and crowd monitoring, and event crowd-density services.
    - Company verification: OCrowd is presented as a named crowd-counting offering connected to operational insights.

189. About | Trakomatic
    - Company verification: Trakomatic identifies itself as a Singapore-based technology company supplying video analytics and a cloud insights portal.
190. AGIL Digital Twin - 3D Intelligence for Situational Awareness and Operational Efficiency
    - Company verification: ST Engineering markets AGIL Digital Twin as a real-time software platform for spatial operations.
    - Company verification: The brochure identifies people tracking, crowd analytics, and queue management among supported applications.
191. VACAN - Real-time Crowd Visualization & Digital Signage Platform, Japan
    - Company verification: VACAN markets a Japan-origin crowd-visualization platform combining congestion analytics with signage, maps, and mobile queuing.
    - Company verification: Its official page names Japanese retail, station, and arena applications as supplier-reported deployments.
192. 人流解析システム SafeFlow｜株式会社アスペリア
    - Company verification: 株式会社アスペリア advertises SafeFlow as its own people-flow analysis system.
    - Company verification: The product page connects density and movement analysis to event planning, crowd-related decisions, and discussions with authorities.
    - Company verification: The official SafeFlow product page identifies 株式会社アスペリア and uses ASPERIA CO.,LTD. in its English copyright notice, resolving the absence of an official English rendering without changing the protected company title.
    - Company verification: SafeFlow is advertised for people-flow and density analysis and event-planning support; the page describes analytical deliverables but does not establish separate external software licensing. ([asperia.jp](https://www.asperia.jp/product/safeflow/))
193. AI 混雑可視化システム「イマコミ」
    - Company verification: The Imakomi commercial page identifies Shobunsha Holdings as the inquiry contact.
    - Company verification: It advertises congestion and queue visualization for facilities, including restaurants and healthcare settings, to support visitor redistribution.
194. コンプレノ | 株式会社 Agoop
    - Company verification: Agoop markets Kompreno as a browser-based people-flow visualization and analysis tool for locations across Japan.
    - Company verification: Its stated functions include inflow/outflow analysis, congestion comparisons, and event or disaster-planning analysis.
195. About SenseTime
    - Company verification: SenseTime's current corporate page establishes its market-facing company identity and AI-software business.
196. Sela-SenseTime
    - Company verification: SenseTime's legacy Sela case identifies SenseXperience AI Video Analysis System and a crowd-analysis role for event operations.
    - Company verification: The described customer application is in Saudi Arabia and does not establish current Asia-Pacific sales.
197. 随申行-大客流保障解决方案
    - Company verification: The official page identifies the legal entity 上海随申行智慧交通科技有限公司 and publishes its stated unified social credit code.
    - Company verification: It offers passenger-flow monitoring, analysis, prediction, and warnings and describes a Shanghai Hongqiao hub application.
    - Company verification: The candidate title faithfully Romanizes the published Chinese legal name.

198. GV-AI Guard - Video Analytics - Video Management Software - Products - GeoVision
   - Company verification: GeoVision markets GV-AI Guard as video-management software with crowd detection for overcrowding and operator alerts.
199. AI Vision Analytics | Safeguard your assets and premises | V3 Smart Tech Malaysia
   - Company verification: V3's Malaysia-facing product page advertises AI Vision Analytics software with crowd counting and overcrowding detection.
200. On-Premise AI for Retail: Footfall, Heatmaps, Loss Prevention
   - Company verification: Nodeflux markets VisionAIre for live footfall, checkout-queue measurement, and shopper heatmaps.
   - Company verification: The product page explicitly addresses Indonesian and Southeast Asian retail applications.
201. Crowd Management System - Solusi Cerdas Kelola Keramaian - GSI Indonesia
   - Company verification: GSI's September xx.xx 2026 business article advertises a crowd-management system for Indonesian venues and transport facilities.
   - Company verification: Its stated offering includes density monitoring, dashboards, and crowd-related alerts; proprietary software ownership is not established.
202. Intelligent Video Analytics & AI-Driven Solutions
   - Company verification: Cylix Technologies, Inc. advertises integrated AI video-analytics solutions including crowd management.
   - Company verification: The page identifies its Philippine business address and contact details.
203. The Event Operating System | EEX
   - Company verification: EEX's Indonesia-facing software catalog advertises real-time crowd-density monitoring and access control across exhibition halls.
   - Company verification: The catalog supports an advertised platform role but does not resolve the underlying legal supplier.
204. ADDtix Malaysia | Event Ticketing & Crowd Management
   - Company verification: ADDtix's Malaysia-facing platform advertises crowd/capacity control and physical entry-queue management.
   - Company verification: The page promotes Malaysian availability but does not establish completed paid local deployments.
205. Online Event Management Software Malaysia 2026 - Evenesis
   - Company verification: Evenesis lists crowd management within its event-software ecosystem.
   - Company verification: The inspected material does not adequately distinguish physical density or flow management from event check-in and engagement functions.
206. e-ticketing2u - Your Event Registration & Ticketing Solution
   - Company verification: The e-ticketing2u offering identifies LCP Buildsoft Technology (M) Sdn Bhd as its Malaysian builder.
   - Company verification: It advertises software, real-time monitoring, mobile applications, and crowd-management support, without establishing detailed physical crowd functions.
207. Crowd counting - White paper and Installation guide, April 2026 | Hanwha Vision Support Portal
   - Company verification: Hanwha Vision's April 2026 documentation attributes crowd counting to WiseAI software and describes VMS monitoring and alarm integration.
   - Company verification: The documented role includes embedded camera analytics and does not establish separately licensed software revenue.
208. AI people counting software for real-time crowd monitoring
   - Company verification: AxxonSoft markets Crowd Estimation within Axxon One for real-time crowd monitoring and alerts in events, transportation hubs, and retail spaces.

209. SecurOS Tracking Kit - One Solution, 10 Detectors
   - Company verification: ISS identifies Crowd Detector within SecurOS Tracking Kit.
   - Company verification: The catalog offers the modules separately with third-party VMS platforms or packaged with SecurOS.
210. Visitor Management System - Qmatic
   - Company verification: Qmatic offers visitor-management software for limiting visitor numbers and managing physical visitor flow.
   - Company verification: Its Mobile Ticket offering permits remote waiting and live queue progress.
211. Wavetec's Toolkit for Black Friday Crowd Management
   - Company verification: Wavetec's October xx.xx 2023 commercial article offers its Queue Management System for retail crowd management and physical customer flow.
212. SimTread 2026｜無償提供プラグイン
   - Company verification: The Japanese SimTread 2026 catalog advertises pedestrian and crowd-flow simulation.
   - Company verification: The add-on is offered without an additional charge to qualifying Vectorworks commercial subscription or Service Select customers.
213. SimTread 使用許諾条件
   - Company verification: The published SimTread software license identifies Vectorworks, Inc. as a contracting licensor.
214. SimTread 製品版 使用許諾条件
   - Company verification: A separate published SimTread commercial license identifies Vectorworks Japan Co., Ltd.; regional contracting attribution therefore requires clarification.
215. NFL Draft - Meshh
   - Company verification: Meshh reports supplying movement and event-zone analytics for the 2023 NFL Draft, including crowd-flow, arrival, and dwell insights.
216. GHD develops new digital tool in collaboration with NEC to optimise event insights
   - Company verification: GHD's October xx.xx 2023 announcement identifies Show Insights as a digital tool developed with NEC Birmingham.
   - Company verification: The event-organizer dashboard integrates third-party data and provides venue-use and crowd-density insights.
217. Movement Strategies | Advisory | GHD
   - Company verification: GHD's Movement Strategies services identify SENSE as in-house pedestrian-modeling software used in transport and evacuation advisory work.
218. Artificial intelligence for traffic planning and safer surroundings | AFRY
   - Company verification: AFRY's November xx.xx 2019 announcement identifies Flowity as its product for analyzing movement of people and vehicles.
   - Company verification: The announcement identifies large-event crowd-flow and safety applications.
219. DEEP SOLUTIONS SOFTWARE, SL at Catalonia Industry Suppliers Directory
   - Company verification: The Catalonia government supplier directory identifies DEEP SOLUTIONS SOFTWARE, SL as a Barcelona software developer.
   - Company verification: Its listed offerings include crowd monitoring; the entry states that it was last updated in January 2022.
220. How Lauretta AI Turns Existing CCTV Into Operational Intelligence | Lauretta AI
   - Company verification: Lauretta AI's July xx.xx 2026 business article describes B-Sight Depth Perception and crowd count, density, movement, dashboard, and alert applications.
   - Company verification: The article attributes its external product description to a government survey; it does not establish independently verified current sales.

221. Crowd Analytics & People Counting for Events | CrowdSense
    - Company verification: CrowdSense's substantive product landing advertises event crowd analytics, occupancy dashboards, alerts, and connected displays.
    - Company verification: The inspected offering does not resolve the underlying legal contracting supplier.
222. AT&T Video Intelligence | Intelligent Video Surveillance Solutions
    - Company verification: AT&T maintains a specific Video Intelligence commercial offering page.
    - Company verification: This inspected record alone does not establish a crowd-specific software role.
223. Optimising Passenger Flow at Aberdeen International Airport with Beonic's AI-Powered Insights & LiDAR
    - Company verification: Beonic's March xx.xx 2025 Aberdeen International Airport case describes its platform for passenger flow, queues, occupancy, and congestion information.
224. Releases - Milestone Systems
    - Company verification: Milestone's inspected release index includes BriefCam software releases, including BriefCam 2025 R1.
    - Company verification: The release index is portfolio-continuity evidence, not a substitute for a crowd-specific product catalog.
225. Airport software | Xovis
    - Company verification: Xovis markets AERO as a managed airport passenger-flow solution combining its sensors with software, dashboards, queue analysis, and alerts.
226. accesso LoQueue Virtual Queuing System | accesso
    - Company verification: accesso markets LoQueue for virtual queuing at physical attractions, with live operational dashboards and queue-measurement functions.
227. Better Virtual Queuing: Improve the Passenger Experience
    - Company verification: Copenhagen Optimization directly markets Better Virtual Queuing for airport passenger arrivals, queue demand, and peak management.
228. Pedestrian Dynamics Release Notes
    - Company verification: InControl publishes Pedestrian Dynamics release notes identifying version xx.xx and its software release activity.
    - Company verification: The document does not independently establish current external licensing terms.
229. crowd:it download - accu:rate
    - Company verification: accu:rate's crowd:it page offers a starter license and states that users can purchase an appropriate license.
    - Company verification: The page identifies accu:rate GmbH and a Munich address.
230. Explore the crowd:it Plugin in Vectorworks
    - Company verification: A December xx.xx 2023 Vectorworks article documents accu:rate's crowd:it plugin and commercial access offer for Vectorworks customers.
    - Company verification: Vectorworks documents a design-platform integration route for the third-party crowd:it offering; this is not evidence that Vectorworks owns crowd:it.
231. Architecture | Mott MacDonald
    - Company verification: Mott MacDonald's architecture services describe STEPS as its tool for pedestrian simulation in infrastructure planning.
232. Sectors - Halo Solutions
    - Company verification: Halo offers a shared operational platform connecting security, safety, facilities, and external teams for complex multi-team environments.
    - Company verification: This establishes an advertised coordination role, not a confirmed crowd-density analytics product.
233. Wintics | AI Video Analytics Software
    - Company verification: Wintics' inspected portfolio identifies Wintics LIVE and applications including crowd movements, people counting, waiting-time estimation, and overcrowded-zone detection.

234. BEONIC UK LIMITED overview - Find and update company information - GOV.UK

- Company verification: Companies House lists BEONIC UK LIMITED, company xx.xx as active and records CROWDVISION LIMITED and CROWD VISION LIMITED as its previous names. This establishes UK legal continuity, not the entire Beonic group's ownership or current customer contracts. ([find-and-update.company-information.service.gov.uk](https://find-and-update.company-information.service.gov.uk/company/xx.xx))

235. HikCentral Professional AE Specification

- Company verification: The official HikCentral Professional AE Specification lists people-density analysis, queue analysis, occupancy monitoring, capacity limits, and capacity-related alarms within the named software platform. The undated specification does not establish current local sales or present licensing terms. ([pinfo.hikvision.com](https://pinfo.hikvision.com/hkwsen/unzip/20221117155452_63455_doc/pdf.pdf))

236. CLEAR Mobile - Predictable Airport Security | CLEAR

- Company verification: CLEAR currently advertises CLEAR Mobile as an app-enabled airport-lane service with purchasable date-specific passes and named participating airports.
- Company verification: The page states that no specific arrival time is required; CLEAR Mobile therefore should not be represented as proof that the historical RESERVE appointment product continues unchanged. ([clearme.com](https://www.clearme.com/clear-mobile))

237. CLEAR Mobile Terms | CLEAR

- Company verification: CLEAR Mobile's contractual terms identify Secure Identity, LLC and its affiliates as providers and describe the program as virtual-queuing services at participating locations.
- Company verification: The terms establish commercial ordering and payment arrangements, not independently attributable crowd-software revenue or a separately licensed airport software product. ([clearme.com](https://www.clearme.com/clear-mobile-terms))

238. Corporate information | Keenfinity Group I Global

- Company verification: Keenfinity Group's corporate information identifies Keenfinity GmbH in Munich and commercial-register entry HRB xx.xx.
- Company verification: The corporate notice establishes a legal business identity behind the group presentation, not the jurisdiction-specific Intelligent Insights contracting entity.

239. KEENFINITY Group | Intelligent Insights Base | IGI-BASE

- Company verification: Keenfinity's commercial catalog lists Intelligent Insights Base as a software license with crowd-level visualization, occupancy tracking, and flow visualization.
- Company verification: The page contains limited-stock and inconsistent availability indicators; the listing supports portfolio participation but not confirmed current order fulfillment or deployment continuity.

240. Smart Airport - G Element

- Company verification: G Element's Smart Airport page advertises NUCLEUS as a unified situational-management software platform incorporating queue alerts and information supporting passenger-crowd reduction.
- Company verification: The page identifies G Element Pte Ltd in its copyright notice and links a 2015 airport brochure; current licensing, deployment continuity, and contracting attribution remain unresolved.

241. Unified Security Management - G Element

- Company verification: G Element's NUCLEUS application description explicitly includes integration of video-content analytics concerning unusual crowd movement and crowd detection.
- Company verification: This supports an integrated software-platform role, not ownership of every upstream analytics component; third-party analyst claims elsewhere on the page are not used.

21. Key Experts

[redacted] Affiliations include software providers, AIT Austrian Institute of Technology, Delft University of Technology, Event Safety Alliance, and other research, professional, and commercial organizations. The listed professional affiliations span the Americas, Europe, Africa, the Middle East, and Asia-Pacific, providing geographic context for the represented expertise without establishing representative coverage of those regions.

Table 423. Global Crowd Management Software Market, Key Experts

Name	Professional Role	Organization	Country
Alex Bäcker	Co-founder and Former Chief Executive Officer	QLess	United States
Alexandre de Lima Bicho	Professor, Center for Computational Sciences	Federal University of Rio Grande (FURG)	Brazil
Alexei Agratchev	Co-founder and Chief Executive Officer	RetailNext	United States
Allen Chew	Co-founder	Trakomatic	Singapore
Anders Johansson	Professor of Intelligent Transport Systems	University of Bristol	United Kingdom
Andreas Schadschneider	Professor of Theoretical Physics	University of Cologne	Germany
Andrew Farah	Co-founder and Chief Executive Officer	Density	United States
Angelika Kneidl	Co-founder and Managing Director	accu:rate GmbH	Germany
Ankit Raj	Co-founder and Chief Technology Officer	Staqu Technologies	India
Anne Templeton	Senior Lecturer in Social Psychology	University of Edinburgh	United Kingdom
Armin Seyfried	Professor of Computer Simulation for Fire Safety and Pedestrian Traffic	University of Wuppertal	Germany
Arun Nair	Co-founder and Chief Technology Officer	RetailNext	United States
Asaf Birenzvieg	Co-founder and Chief Executive Officer	viisights	Israel
Ashish Verma	Professor of Transportation Systems Engineering	Indian Institute of Science	India
Ashwin Amarapur	Co-founder and Chief Executive Officer	AllGoVision	India

Table 423 - continued

Name	Professional Role	Organization	Country
Atul Rai	Co-founder and Chief Executive Officer	Staqu Technologies	India
Avinash Trivedi	Vice President, Business Development	Videonetics	India
Ben Redfield	Co-founder	Density	United States
Billy Tucker	Chief Executive Officer	Beonic	Australia
Brandon Duffield	Managing Director	Ticketpro	South Africa
Chris Kemp	Founder and Chief Executive Officer	Mind Over Matter Consultancy	United Kingdom
Chris Lord	Co-founder and Chief Technology Officer	Lambent	United States
Christoffer Klemming	Co-founder and Chief Executive Officer	Waitwhile	United States
Claudio O. Dorso	Professor and computational-physics researcher	University of Buenos Aires	Argentina
Claudio Rosito Jung	Professor, Institute of Informatics	Federal University of Rio Grande do Sul (UFRGS)	Brazil
Clifford Stott	Professor of Social Psychology	Keele University	United Kingdom
Cédric Hutchings	Co-founder and Chief Executive Officer	Outsight	France
Daichi Yanagisawa	Associate Professor, Research Center for Advanced Science and Technology	The University of Tokyo	Japan
Daniel Blanc	Co-founder and CEO	Zig	Brazil
Daniel Nilsson	Professor of Fire Engineering	University of Canterbury	New Zealand
Daniel R. Parisi	Professor and pedestrian- and crowd-dynamics researcher	Buenos Aires Institute of Technology (ITBA)	Argentina
Daniel Swenson	Co-founder	Thunderhead Engineering	United States
David Gordon	Co-founder and Chief Executive Officer	Kepler Analytics	Australia
David Mah	Co-founder and Managing Director	Kepler Analytics	Australia
David Studer	Co-founder and Former Chief Executive Officer	Xovis AG	Switzerland
Dinesh Manocha	Professor of Computer Science and Electrical and Computer Engineering	University of Maryland	United States
Dirk Helbing	Professor of Computational Social Science	ETH Zurich	Switzerland

Table 423 - continued

Name	Professional Role	Organization	Country
Dorine Duives	Assistant Professor of Pedestrian Dynamics	Delft University of Technology	Netherlands
Edwin Galea	Professor of Mathematical Modelling and Founder, Fire Safety Engineering Group	University of Greenwich	United Kingdom
Eric Stuart	Director	Gentian Events	United Kingdom
Eric Thimba	Co-founder and Chief Executive Officer	Mookh Africa	Kenya
Erica Kuligowski	Human Behaviour and Evacuation Researcher	RMIT University	Australia
Erin Morrow	Product Director, MassMotion	Oasys, an Arup company	Canada
Fiona Strens	Co-founder and Former Chief Executive Officer	CrowdVision	United Kingdom
G. Keith Still	Founder and Crowd Science Consultant	Crowd Risk Analysis Ltd	United Kingdom
Gabriel Benarrós	Co-founder and CEO	Ingresse	Brazil
Gary Tan	Associate Professor of Computer Science	National University of Singapore	Singapore
Gerta Köster	Professor of Applied Mathematics	Munich University of Applied Sciences	Germany
Gil Fried	Professor and Chair, Department of Administration and Law	University of West Florida	United States
Gopal R. Patil	Professor of Civil Engineering	Indian Institute of Technology Bombay	India
Itsik Kattan	Former Chief Executive Officer	Agent Video Intelligence (Agent Vi)	Israel
Ivy Li	Co-founder and Managing Director	iOmniscient	Australia
James Cobb	Founder and Chief Executive Officer	Crowd Connected	United Kingdom
James Hedley	Co-founder and Director	Quicket	South Africa
James Tagg	Co-founder and Managing Director	Quicket	South Africa
Janet Sellery	Health and Safety Consultant	Sellery Health + Safety	Canada
Jim Digby	Co-founder and President	Event Safety Alliance	United States
John Drury	Professor of Social Psychology	University of Sussex	United Kingdom
Justin van Wyk	Managing Director, South Africa	Ticketmaster South Africa	South Africa

Table 423 - continued

Name	Professional Role	Organization	Country
Kapil Bardeja	Co-founder and Chief Executive Officer	Vehant Technologies	India
Katsuhiro Nishinari	Professor, Research Center for Advanced Science and Technology	The University of Tokyo	Japan
Kevan Jones	Executive Director	Southern African Communications Industries Association	South Africa
Laurence Smith	Executive	Graphic Image Technologies	South Africa
Lou Marciani	Co-founder and Director	Innovation Institute for Fan Experience	United States
Maarten Weyn	Professor of Electronics and ICT	University of Antwerp	Belgium
Mahesh Saptharishi	Executive Vice President and Chief Technology Officer	Motorola Solutions	United States
Majid Sarvi	Professor of Transport Engineering	The University of Melbourne	Australia
Marcel Altenburg	Senior Lecturer in Crowd Science	Manchester Metropolitan University	United Kingdom
Mark Herrera	Director of Safety and Security	International Association of Venue Managers	United States
Mark LaVanty	Co-founder and President	SenSource	United States
Mark Nicholson	Co-founder and Chief Executive Officer	VivaCity	United Kingdom
Martin Stubenschrott	Research Engineer, Transport and Pedestrian Simulation	AIT Austrian Institute of Technology	Austria
Matthias Houllier	Co-founder	Wintics	France
Michael Andre	Co-founder, President and Chief Executive Officer	Gateway Ticketing Systems	United States
Michael Birnhack	Professor of Law	Tel Aviv University	Israel
Michael Kennedy	Co-founder and Chief Technology Officer	Quicket	South Africa
Michael Kinsey	Fire Engineer and Evacuation-Modelling Specialist	Arup	China
Michael Schreckenberg	Professor of Physics of Transport and Traffic	University of Duisburg-Essen	Germany
Mike Lord	Chair, Event Safety Council	Southern African Communications Industries Association	South Africa
Ming C. Lin	Professor of Computer Science	University of Maryland	United States

Table 423 - continued

Name	Professional Role	Organization	Country
Mohcine Chraibi	Pedestrian Dynamics Research Group Leader	Forschungszentrum Jülich	Germany
Mubbasir Kapadia	Associate Professor of Computer Science	Rutgers University	United States
Nic Halverson	Co-founder and Chief Executive Officer	Occuspace	United States
Nirajan Shiwakoti	Associate Professor, Civil and Infrastructure Engineering	RMIT University	Australia
Paul Bouzol	Co-founder and Chief Executive Officer	Affluences	France
Paul Foster	Co-founder and Chief Executive Officer	OnePlan	United Kingdom
Paul Wertheimer	Founder and Principal	Crowd Management Strategies	United States
Peter Ashwin	Principal	Event Risk Management Solutions	United States
Ranjith Parakkal	Co-founder and former Chief Executive Officer	Uncanny Vision	India
Raul Bravo	Co-founder and President	Outsight	France
Russ Simons	Managing Partner and Chief Listening Officer	Venue Solutions Group	United States
Rustom Kanga	Co-founder and Chief Executive Officer	iOmniscient	Australia
Serge Hoogendoorn	Professor of Traffic Operations and Management	Delft University of Technology	Netherlands
Shai Evian	Co-founder and Chief Executive Officer	Howler	South Africa
Shmuel Peleg	Co-founder and Chief Scientist	BriefCam	Israel
Simon Ancliffe	Founder, Movement Strategies	GHD (Movement Strategies)	United Kingdom
Soraia Raupp Musse	Professor and virtual-human and crowd-simulation researcher	Pontifical Catholic University of Rio Grande do Sul (PUCRS)	Brazil
Stacey Hall	Executive Director, National Center for Spectator Sports Safety and Security	University of Southern Mississippi	United States
Stefan Seer	Senior Scientist, Transport and Pedestrian Simulation	AIT Austrian Institute of Technology	Austria
Stephen J. Guy	Associate Professor of Computer Science and Engineering	University of Minnesota	United States

Table 423 - continued

Name	Professional Role	Organization	Country
Steve Allen	Founder and Crowd Safety Consultant	Crowd Safety	United Kingdom
Steve Brown	Chief Executive Officer	accesso	United States
Steven A. Adelman	Principal Attorney	Adelman Law Group	United States
Subhash Challa	Co-founder and Chief Executive Officer	SenSen	Australia
Tehilla Shwartz Altshuler	Senior Fellow and Head of the Democracy in the Information Age Program	Israel Democracy Institute	Israel
Thomas Pramotedham	Chief Executive Officer	Presight	United Arab Emirates
Tinku Acharya	Founder and Managing Director	Videonetics	India
Tobias Kretz	Pedestrian Simulation Researcher and Software Developer	PTV Group	Germany
Tomonori Sano	Professor, Faculty of Human Sciences	Waseda University	Japan
Weiguo Song	Professor, State Key Laboratory of Fire Science	University of Science and Technology of China	China
Wentong Cai	Professor of Computer Science	Nanyang Technological University	Singapore
Wiktor Bourée	Founder and Chief Executive Officer	Technis	Switzerland
William Eldin	Co-founder and Chief Executive Officer	XXII	France
Winnie Daamen	Associate Professor, Transport and Planning	Delft University of Technology	Netherlands
Yang Lu	Co-founder and Chief Technology Officer	VivaCity	United Kingdom
Yosuke Okada	Co-founder and Chief Executive Officer	ABEJA	Japan
Zack Klima	Founder and Chief Executive Officer	WaitTime	United States
Zvika Ashani	Co-founder and former Chief Technology Officer	Agent Video Intelligence (Agent Vi)	Israel

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