

**MEDIA  
PLANET**

JANUARY 2010

# Digital Out-of-Home

YOUR GUIDE TO DIGITAL SIGNAGE APPLICATION & BUSINESS TRENDS TODAY





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# MEDIA PLANET

## DIGITAL OUT-OF-HOME

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Lyle Bunn

# Bright Lights In—And For, The Economy

BY: LYLE BUNN, PRINCIPAL & STRATEGY ARCHITECT, BUNN COMPANY

The economy has its shining lights and the brightest of these is North America's Digital Signage and Digital Out-of-Home industry. These centrally-controlled digital media networks are improving the effectiveness of communications in out-of-home environments wherever people shop, buy, wait, work, travel and gather.

This provides significant improvement to the return on communications investment, helping brands, marketers, retailers, facility operators and other organizations such as consumer services, government, campuses and sport/arts/entertainment centers to effectively achieve their communications and business goals, at a time when communicating to shoppers, patrons, staff and students is increasingly complex.

Arbitron has reported research

that Out-of-Home video as a medium reaches 67 percent of Americans 18 years and older each month, and delivers a fairly representative cross-section of consumers. 76 percent of those seeing digital signage noticed displays in multiple venues.

Advancements in digital signage technologies are improving network economies and message targeting to specific demographics and times of day and location.

Significant advances continue to be made to simplify advertising

planning and placement.

David Drain, executive director of the 400 member Digital Signage Association says "Digital Signage is more like the internet than it is TV. When internet advertising came along a decade or so ago, advertisers weren't sure how to create ads for it, because it was different than creating ads for TV, radio, newspapers and magazines. Then advertisers started to realize the beauty of it, with measurements like impressions and "click-throughs." Digital signage

is today second only to the internet in advertising revenue growth."

At the 2009 Out-of-Home Video Advertising Bureau (OVAB) Digital Media Summit, Bob Liodice, CEO of the Advertising Association of America said "Marketers who aren't taking advantage of this (medium) are going to be left in the dust." At the same summit, Bob Garfield, editor-at-large for Advertising Age noted that "unlike traditional media, out-of-home cannot be avoided." Read on!

## A VERY SPECIAL THANKS TO...



NEC Display Solutions is a leading provider of commercial LCD display and projector solutions, with an acute focus on digital signage. As a leader in this market, NEC powers VUKUNET, a universal ad serving and distribution platform that connects digital out-of-home networks with advertising revenue. Learn more at [www.vukunet.com](http://www.vukunet.com).



Cisco is the worldwide leader in networking that transforms how people connect, communicate, and collaborate. The Cisco Digital Media Suite is a comprehensive offering of digital signage, Enterprise TV and social video applications, all managed from a single user interface to help organizations improve productivity and increase profitability.



HP's industry-leading technology and partnerships deliver complete, integrated digital signage solutions that help make your communications more relevant and memorable to your key audiences.



Digital Signage Expo is the world's largest annual international trade show and conference dedicated to digital signage.



Our purpose is to accelerate the growth and advance the excellence of digital signage deployments worldwide.



Out-of-Home Advertising Bureau is the not-for-profit industry trade association that promotes the advancement of digital and video place based advertising networks.



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Chris Gibbs

# Digital Signage Expo:

## Uniting Users and Vendors

BY: CHRIS GIBBS, PRESIDENT EXPONATION, LLC

Digital signage, a relatively new and emerging technology, is revolutionizing communications everywhere—in airports, restaurants, banks, hotels, retail stores and more. In just about any place you visit or shop, digital signage is delivering dynamic, customized information to help enhance your experience.

**Y**ou won't find it everywhere as yet, but that is rapidly changing as more and more venues install dynamic flat screen, projection and interactive technology with eye-popping content that is designed to serve you better and faster.

Digital Signage Expo, produced by Exponation LLC, is currently the world's largest trade show and conference serving this fast-paced and

emerging industry.

From its inception, Digital Signage Expo's role has been to bring end users and technology vendors together for invaluable face-to-face communication and professional education.

We also have heavily invested in a robust and information-packed Web portal that supports the ever-increasing need for digital signage and digital out-of-home network informa-

tion. This new portal is organized by end-user industry segment and offers news, case studies, research, recorded seminar viewing, video interviews and more.

Digital Signage Expo, a two-time Tradeshaw Week "Fastest 50" award winner, will stage February 23-25, 2010, at the Las Vegas Convention Center in Las Vegas, NV. For more information visit: [www.dse2010.com](http://www.dse2010.com).



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# Engaging Customers In Retail

The U.S. retail industry is comprised of nearly 1.1 million establishments with annual sales of close to \$4.5 trillion. The industry employs 25 million people, nearly one in five working Americans. Retailers are struggling through the worst economic environment in over 40 years. Digital signage is increasingly finding its place as a branding and merchandising tool at and near the point of purchase.

**L**awrence Dvorchik, general manager of The Digital Signage Show which is co-located with KioskCom Self-Service Expo, notes that as organizations set their 2010 strategies, a few consistent themes continue to be at the forefront.

1. What can we do to engage with customers better?
2. What can we do to make their experience better—and drive them to purchase?
3. What will we need to do to maximize investment in these engagement programs and deliver the necessary ROI as fast as possible?

The use of digital signage along with kiosks, mobile and other customer-facing and engaging technologies allows for better customer service, product knowledge and a more informed purchase. They also provide an organization with the opportunity to cross-promote related activities, products and services that are of interest to the customer, increasing “conversion,” revenues per order, visit frequency, gift card and loyalty programs or other sales generating activities.

Point of Purchase Advertising International (POPAI), the only

global, non-profit trade association dedicated to the advancement of marketing at retail, has had an active Digital Signage membership for several years devoted to advancing the digital signage industry.

As more retailers continue to deploy their retail selling floors to engage consumers in a brand dialogue and invite shoppers to experience the retail brand, we see digital signage being incorporated into various marketing at retail designs—from endcaps to entire store networks to enhance the shopping experience.”

POPAI Digital Signage working committees are advancing digital standards for the industry and educating the marketing at retail community about the potential of digital signage in-store while also tackling industry issues.

“The volume of business and the traffic it represents make retail stores of all types an ideal venue for placing advertising where it will have the most impact—at the point of sale,” says Richard Lebovitz, editorial director for Atlanta-based Digital Signage Expo. He adds, “Retail operators and brand marketers have seized on this opportunity to place digital displays with relevant shopper messaging

at strategic points within retail environments—in store windows, in the aisles, on shelves and at the cash register.”

In addition to improving the sophistication and relevancy of their digital messaging, retail establishments also are incorporating a variety of digital display technologies to engage their customers, explains Lebovitz. These include the use of interactive kiosks, digital shelf tags, anonymous recognition technology, customer-facing screens at checkout counters and more.

“Retail stores also are designing stores with digital signage in mind rather than as an afterthought,” says Lebovitz. “In the coming years, we expect to see digital displays increasingly integrated into the décor rather than simply treated as a fixture to be hung on the store walls.”

Digital signage is increasingly integrated into “architectural media” which brings a physical expression to a brand. Chester Niziol, CEO of Architectural Media Corp says “the integration of static or dynamic media with physical infrastructure can provide a compelling, high impact experience in which the brand is clearly and powerfully expressed and com-

munications goals can be more fully achieved.”

Jose Avalos, digital signage director at Intel’s Embedded and Communications Group notes, “Intel has a keen interest in developing digital signage technologies that will provide value to industries such as retail and hospitality, and enhance the ways we shop and live.”

At the National Retail Federation (NRF) Convention in New York, Intel unveiled a new concept device based on consumer research showing how stores can better connect with their shoppers. The 7-foot-6-inch digital window concept enhances the consumer in-store experience within a multi-user, multi-touch form factor using an LCD display and holographic glass to project augmented reality-enabled maps of each floor of the store. This enables retailers to superimpose images like coupons and sales promotions next to the product visualizations on the glass. Says Avalos, “Intel envisions that future digital signs will also enable users to submit feedback on products, read customer reviews, view past purchasing histories and share what they have discovered with their friends via social media and mobile phone integration.”

“A key word is ‘environment’ says Virginia Cargill, an industry veteran and president of CBS Outernet. “The users are finally realizing what the industry has been saying for a few years now—‘environment’ drives the location, the technology and the optimal type of messaging and

graphics. Agencies have been testing and are now embracing the fact that creative must be different for different environments and that those environments can even be different within the same retail store.”

Jeff Hastings, chief executive officer, BrightSign says, “The cost of hardware is affordable for most customers, and it is capable of delivering high quality and compelling point of sale presentations to buyers at the point of decision.”

Laura Davis-Taylor, newly named VP of Global Retail Strategy at Creative Realities, who, in her years heading up Retail Media Consulting, became a leading authority in the in-store digital media space, notes: “Almost every analyst and futurist out there is mentioning digital signage as a technology that retailers will capitalize on in 2010. However, in conjunction, they are also speaking to the importance of brand leaders surrounding themselves with the right people and empowering them to make positive change. Both the marketing and the retail industry are at critical junctures. People are changing everything about how they communicate with brands, with each other and on what platforms.

Thomas Opdycke, CEO of DS-IQ reflects that digital signage technologies now go beyond measurement: “They optimize sales lift in real-time and can prove and improve ROI continuously through better campaigns and actionable insights. Hard data is a powerful catalyst.”



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# Big Names Make Waves In The Industry

Digital signage's inherent benefits are provided by a "technology ecosystem" of digital media authoring, management, connectivity and display, the elements and interconnectivity of which have been continuously improving as the industry has matured.

Chris Gibbs, president of Atlanta-based Exponation LLC, which produces the industry's annual Digital Signage Expo in Las Vegas, has seen growth from 600 to over 3000 technology provider and end user attendees in the event's five years.

Some of America's largest and most respected technology providers to industry and government are moving digital signage to its next level.

One such firm is Harris Corporation, which serves government, broadcast, advertising and commercial markets in more than 150 countries and is headquartered in Melbourne, Florida. It has

\$5 billion of annual revenue and more than 15,000 employees, including nearly 7,000 engineers and scientists. "The promise of digital signage overall that is exciting is putting content closer to the customer's action" notes Harris Morris VP, Broadcast, Harris Corporation.

Growing networks require reliable systems to connect screens to hardware and management software. Getting to consumers in the right places can be difficult with wires and their inherent limitations. Wireless giant Sprint has recognized the importance of this industry and has stepped in to take advantage of the opportuni-

ties by providing the fastest wireless network to date. Wayne Ward, vice-president, Sprint Emerging Solutions, says, "The dynamic landscape of digital signage with its expanding need to deliver media rich high-definition content will require a network that can deliver the peak performance and value that 4G enables. Sprint is excited to enable these new advertising platforms on the 4G network, today."

Jose Avalos, digital signage director at Intel's Embedded and Communications Group, who will deliver the opening keynote address at the industry's Digital Signage Expo says,

"We anticipate that digital signage solutions based on Intel® Core™ "I" micro-architecture will help stabilize a market that has been fragmented by numerous, non-standards-based platforms and transform the way people interact with digital signs in environments such as retail stores, airports, banks and hotels." Intel technology is expected to deliver additional value to digital signage operators and users with improvements in Total Cost of Ownership (TCO) via energy savings and remote management capabilities, as well as improved return on investment (ROI) for advertising using Anonymous Video Analytics. To help customers integrate these solutions into their signage applications, Intel has also developed a next-generation Digital Signage Platform based on Intel® Core™ I Micro Architecture validated with Microsoft's Windows

Embedded Standard 2011 operating system.

"The DS/DOOH industry has seen tremendous growth in the past years and with it, the need to efficiently and economically move increasingly larger volumes of the right media to an increasing number of displays," says Jacqueline Weiss, CEO, National Datacast Inc., which uses the national, digital media distribution network of PBS for file transfer. She adds, "National Datacast Inc. brings proven reliability, capability and scale-ability at low-cost for enterprise networks."

Dell recently utilized DOOH as part of its global "Take Your Own Path" advertising campaign in India. According to P.H. Ferrand, Dell's Vice President of Global SMB Marketing, Dell increased their brand awareness and market share—proof that DOOH stands up to the test.



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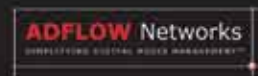


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# Right Time, Right Place

Digital signage and Digital Out-of-Home (DOOH) offers advertisers reliable, measured dynamic media presentation with very concise market, location, timing and demographic targeting at a scale and price that makes DOOH one of the best advertising tools available.

**"T**argeting!!!" says Jerry Hall, president/CEO, TargetCast Networks, Inc. "Television viewing is clearly not going away but it is increasingly going away from home." Dan DeSmet, TargetCast Networks Inc., vice president of marketing cites an example of the enhanced value of Digital Out-of-home. "A recent campaign delivered by our network for a national telecommunications marketer in multiple markets, featuring different services, and pricing plans by zip code. Our agency partner provided the creative units and zip code and we had the campaign up and running in less than 20 minutes. That's real competitive advantage in today's quick changing economy."

"Digital out-of-home is a growing medium—a significant statement in a time when traditional media outlets are struggling" says Bill Yackey, editor of the online industry publication DigitalSignageToday.com. "And ad

agencies are noticing. Knowing this, the DOOH industry has begun work to make the buying process easier for those agencies. In addition to OVAB releasing guidelines for the measurement of DOOH advertising networks, networks themselves are using research companies to perform network audits in order to better compare with traditional media. Also, network aggregation services are emerging and allowing media buyers one stop to place ads to targeted demographics down to the screen level."

Adcentricity, a prominent ad sales agency for many DOOH networks, reflects that Digital Out-of-Home (DOOH) is one of the fastest growing mediums in North America. Total DOOH spending will hit \$4.53 billion in 2013, up from \$2.6 billion in 2009, accounting for 44.1 percent of all OOH spending. Marketers are increasingly finding digital out-of-home an effective and efficient medium with 42 percent of agency and brand

marketers planning to increase their spending in the category this year.

There are approximately 180 DOOH networks in the USA and 30 in Canada that carry third-party advertising. Collectively, there are active media screens in over 70 venue types, each with unique audience and media characteristics. The landscape will continue to aggressively grow in capacity and market coverage. More than one-third (38 percent) of active digital OOH network operators are planning capital investments of between \$1M-\$10M to expand their venue and screen capacity in the next 12 months. Just under 20 percent of them plan on expanding the screen count to more than 1,000 each.

"Consumer media consumption patterns have changed and the advertising business is realizing that they need to go where their consumers are Digital OOH lines up with that philosophy of being there," says Rob Gorrie, CEO of Adcentricity. "Certain

brands and agencies have made dramatic swings in their adoption of DOOH in 2009 and have cut their teeth even more than in the past. In the early adopter category, you have companies like GM, Verizon and Bank of America who have long been internal champions of the DOOH space. It has not been a question of changing their view of DOOH, more a matter of making it easy to evaluate, buy and execute for the brand and their agency partner based on their needs. The medium has reached scale, allowing a much deeper penetration to support campaign efforts. Dramatically larger spending and a more strategic approach to campaign placement is expected in 2010 and as networks expand further."

The efficiencies and lower cost of the ad sales/media placement exchange process also reduces the cycle time of ad planning, placement and presentation. As media plans are continuously "tuned" and budgets are continuously refined, this shorter cycle time, which reflects the nimbleness that is an inherent characteristic of Digital Signage, is a significant benefit to marketers and communicators seeking to maximizing ad spending ROI.

The online ad planning and placement exchange allows advertisers of all market scope and budget to take advantage of the growing inventory of dynamic digital displays and the ability to better target audiences in places where people shop, buy, travel, work and gather.

Organizations with a long history of serving the advertising and media industries are bringing products that align with agency approaches and requirements. Harris Corporation's "Punctuate" software, for example, allows campaign planning, placement and review across individual networks and platforms. "The promise of digital signage overall that is exciting is putting content closer to the customer's action," notes Harris Morris VP Broadcast, Harris Corporation.

“There are approximately 180 DOOH networks in the USA and 30 in Canada...”

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PC based solutions have been the most obvious choice for digital signage because of the apparent low cost and easy availability of the technology. Because a PC needs to be many things for many different people, there are many elements of a PC which are not required or endanger reliability in a heavy duty application like digital signage. Items like fans, hard disks have moving parts which will fail in time and there are other parts of the PC which rely on heat dissipation for performance and operation. If heat builds up due to internal or external issues the PC becomes less dependable and can fail.

These problems have been recognized by other industries, where non-PC solutions are used instead, such as automotive, industrial, and medical to name a few areas where long term operational reliability is essential to operations, and in some cases lives depend on it.

SpinetiX is the world's first manufacturer of a non-PC based digital signage solution using Hyper Media technology. The HMP100 devices are purpose built and don't have moving parts. Maintenance is almost eliminated and cost of ownership is reduced. The targeted features allow for a compact design (150g) and lower power



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consumption (only 2W) for a greener solution to what has been a technology compromise with PCs up till now. The HMP100 is dedicated to displaying content and thanks to the use of standards the solution is more robust and reliable. The size, simplicity of use and open standards architecture, makes the HMP100 simpler to install, operate and maintain.



# Connecting DOOH Networks And Agencies

Advertising has primarily been placed through direct contact with DOOH network operators including network association members (See [www.OVAB.org](http://www.OVAB.org)), through advertising sales agencies which represent large networks and display inventories and can help plan ad placement such as Adcentricity and SeeSaw Networks and service providers such as rVue ad serving and distribution technology.

**V**UKUNET advertising exchange was recently announced by NEC Corp, which ranks 85th on Fortune's Global 500. The VUKUNET advertising platform connects digital out-of-home networks with advertising agencies. The free service can generate incremental income to existing networks—even existing ad-based networks, can help pay for new networks and open the door to network expansion.

The ad exchange is a natural extension for NEC, which ranks No. 1 in North America as brand vendor of large-format LCD displays (26-inches and larger) and has ranked No. 1 in LCD displays for commercial/public display usage for the last three years according to DisplaySearch. NEC was ranked No. 1 in digital signage and received Frost & Sullivan's prestigious 2008 Customer Value Enhancement Award.

According to the Future Trends Study conducted by the Digital Signage Association, only about 10 percent of networks are currently running at least 50 percent advertising on their networks (versus patron, staff and student information). Yet, 60 percent of the 1200 survey respondents said that they planned to carry third party advertising in future.

The VUKUNET automated ad exchange can make it easy for organi-

zations and network operators to list their available display "inventory" and for local, regional and national advertisers to place their ads. The system allows for acceptance of the ad by the network operator and verification that the ad has run as intended.

Pierre Richer, president & CEO of NEC Display Solutions says, "The DS/DOOH industry is a growing market that combines hardware, software and integration revenue. However, when one overlays the advertising revenue for digital out-of-home advertising on top of the digital signage components, there is a significant difference on the plus side. This is simply a great opportunity for network operators."

“...60 percent of the 1200 survey respondents said that they planned to carry third party advertising in future.”

## About VUKUNET

VUKUNET helps digital signage network owners generate incremental income by making it easier to connect all screens that currently have time/space available on their network to advertise. Ideal candidates are networks that have locations with heavy foot traffic, substantial dwell time (time spent in

front of the screen), strategic monitor placement, numerous locations in key demographic areas, and that can run a variety of ads from different advertisers instead of being focused on a single brand.

VUKUNET is a breakthrough in digital out-of-home advertising because it is the only platform that

connects all digital signage networks, with the ability to provide the largest single reach in the industry. Advertisers and ad agencies that formerly had to contact hundreds of potential network owners to determine rates and availability can now use the companion ADVUKU ad-serving platform to search for

the best networks in any location. In addition, the proof-of-performance automated technology enables networks to receive a consolidated payment on a monthly basis for all the advertising that ran.

The VUKUNET platform is completely agnostic, meaning ads can be distributed to screens from any

manufacturer, not just NEC and networks that are using almost any CMS (content management system). There is no charge to become a member of VUKUNET.

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# "The Model T" Generation Of Digital Signage

"The digitization of media has transformed the market terrain," explains Kevin Murai, president and chief executive officer, SYNnex Corporation, an annual \$8 billion information technology products distributor. "Although traditional media is not dead, it must evolve and become more personal and dynamic."

Consumers now have choices. Thankfully for marketers, out of home digital signage can provide the type of one on one messaging required to reach today's sophisticated consumer. SYNnex and our IT integration partners are excited to be able to help companies expand customer reach by embracing this digital transformation."

Cisco Digital Signs, part of the Cisco Digital Media System, includes end-to-end product and services offering.

Jeff Hastings, chief executive officer, BrightSign, reflects that "the Digital Signage industry is now at the

same point that the motor industry was 100 years ago, in which the innovations of Henry Ford brought cheap, reliable cars to all with the launch of the Ford Model T in 1908."

The personal computer has achieved for office and home computing what the Model T achieved for motoring—but a new generation of purpose-built, dedicated digital signage devices is emerging for digital signage. These will reduce capabilities' redundancy and complexities, while reducing the costs of purchase, deployment, management and networking without sacrificing

features or performance.

SpinetiX has been advancing the design and use of solid state media players. "The SpinetiX HMP100, with its compact design and lower power consumption is a greener solution," says Serge Konter, communication manager at SpinetiX noting, "Its energy consumption is only 2watts is up to 200-300 times less than a typical PC solution used in digital signage."

Additionally, the use of exciting new touch technology is only in its infancy; and one of the leaders for the development of interactive

technology is HP. The tech giant's multi-touch screens and software allow new ways of interaction for consumers. While touch screen technology is widely used, for example in ATMs, kiosks, and smart phones, HP created new programs designed to attract people to screens and, more importantly, keep them there with innovative programs and marketing ideas. While the application of touch technology is still in its early stage, industry leaders are constantly thinking of new ways to maximize its power. For example, point-of-purchase screens can become interactive, allowing customers to print coupons, join loyalty programs, and answer brief survey questions while waiting in line. There are already many applications, with many, many more on the horizon.

Mike Strand, founder & CEO of

StrandVision, a 20-year veteran of providing technology software solutions, sums up the views of many in the digital signage industry in saying, "I've seen the explosive impacts of past economic rebounds. We believe that digital signage will offer even greater return as this economy gains strength. The need to expand upon traditional advertising combined with the continued decrease in the cost as well as the increase in the capabilities of software, computer, network and display technology will cause digital signage to go gangbusters in 2010."

The testing of early models and the measurement of their success will lead to a better understand of what will capture people's attention. The combination of new technology and proven techniques will propel the growth of the industry further.

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## Why Digital Media?

### Eleven Reasons For A Retailer To Implement A Digital In-Store Media Network

- 1 Enhance the shopping experience.
- 2 Increase in-store conversion and product sales.
- 3 Build your store brand.
- 4 Reduce perceived wait-time for customer.  
According to a study done by BTv+, "Virtually every use of digital signage display generates ... a 40-60 percent reduction in perceived wait time."
- 5 Drive traffic to your website.
- 6 Strengthen relationships with your community.  
"Narrowcasting" capabilities of this medium enables you to pinpoint unique messages down to the location.
- 7 Reduce point-of-purchase expenses and in-store clutter.  
Digital media can help to clear up those aisles while lowering the costs related to printing, shipping, in-store compliance and disposal.
- 8 Improve employee communication and training.
- 9 Strengthen your mobile marketing / Loyalty program.
- 10 Influence inventory and supply chain efficiencies.  
One of the most powerful benefits of this media is to do just-in-time messaging and leverage its ability to drive incremental sales to move over-inventoried product at the specific store level.
- 11 Generate new revenue by selling advertising space.

Courtesy of Stuart Armstrong, President, EnQii North America

DISPLAY INNOVATION MEETS  
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# Increasing Communications And ROI

Digital signage is used across the economy to influence and inform shoppers, patrons, visitors, staff and students at points of purchase, transit, waiting and gathering.

Research indicates that digital signage achieves communications results such as sales lift, product/service enquiries, increased awareness and reduced perceived waiting time while also adding vitality and energy to an environment and improving safety.

Digital signage can provide both high "reach" to large audiences and high "engagement" while messaging can increase traffic to websites and mobile commerce through text, downloads, mobile browsing and even voice messaging.

"Digital signage has grown both in applications and size," says Serge Konter, communication manager at SpinetiX "making it the area of choice for audio visual dealers and system integration companies looking to improve turnover and offer new services their existing customer base. New markets are appearing in digital signage in areas such as building evacuation, community communications, way finding/directions, scheduling displays, facilities & status displays and many more areas.

Jeff Porter, executive VP at Scala, Inc, an outspoken advocate for digital signage who serves on several industry advisory boards explains that "digital signage is not about the technology, but its application!"

Thomas Wyatt, general manager

of Cisco's digital media systems business unit says that the key trends driving Cisco digital signs implementation are:

- Economic challenges are changing business opportunities
- Global value chains and globalization
- Consumerization of information technologies
- Shift in advertising spending
- New social media trends to reach customers and employees

solutions that make creating and distributing Digital Signage presentations a breeze are allowing the Early Majority to embrace Digital Signage and their networks more readily. A year ago, the typical user of digital multimedia content would have a premium brand in their market, and would adopt Digital Signage to associate that brand with exciting new technology. In the context of the margins in these businesses, and other expenditure on premium fixtures

“...digital signage best practices means campaigns that best use message targeting at points of decision and add value to the customer experience.”

Jeff Hastings, chief executive officer, BrightSign notes, "Undue focus on the downturn has masked an essential underlying shift in the market for signage. To draw on the Boston Consulting Group's classic model, Digital Signage has moved from the Early Adopter phase to the Early Majority phase. The Early Adopters were driven by functionality rather than cost—but the Early Majority is much more sensitive to total cost of ownership. Affordable and at the same time powerful software

and fittings, the cost of installing and running a Digital Signage network wasn't especially significant."

David Keene, executive editor of *Digital Signage, Marketing at Retail and System Contractor News* magazines and the recently released *Digital Signage Best Practices Guide* also serves as chair of the Judges Committee for the industry's Digital Signage Innovation (DIGI) Awards which recognize leading edge technologies and applications.

In the retail world Keene reflects,

digital signage best practices means campaigns that best use message targeting at points of decision and add value to the customer experience. It also means integrating digital messaging with point-of-sale, pricing, inventory and other merchandising regimes and databases. It means interaction with the content and devices.

In the transportation world, best practice is reflected in systems such as DIGI award winner British Columbia's SkyTrain Rapid Transit that alerts users of any emergency issues when they enter a station on LCD screens and then convert easily in non-emergency times so the panels

public access facility.

A DIGI Award also recognized a deployment by local broadcaster WRAL on buses in Raleigh, NC. Project partners in the nation's first over-the-air broadcast of mobile digital television to the public, which uses the Harris Corporation. "InfoCaster" digital signage platform also include LG Electronics, Microspace Communications the CBC New Media Group and the City of Raleigh, N.C.

Keene said, "This illustrates a key direction for broadcasters and cable companies to participate in the high growth digital signage sector. Viewers can be exposed to hyper-local, highly relevant content as they travel and have the ability to interact via mobile phone. And because the screens are connected to a network, ads can be geo-targeted based on where bus is at that moment. It serves as a great example of content relevancy and contextual advertising."

Harris Morris, VP Broadcast, Harris Corporation points out that "the promise of digital signage for broadcasters is to marry a broadcaster's local expertise, their local knowledge, their relationships to put their content in front of consumers, using Harris Corporation. digital signage solutions to manage it."

Keene offers that "Best Practices" as illustrated through DIGI Awards entries (not just the winners) are the proof of how far digital signage has come as an industry." See the DIGI Awards winning entries at [www.digitalsignageweekly.com](http://www.digitalsignageweekly.com)

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BORDERS



# Public Safety Through Digital Signs

Americans owe a safer environment to digital signage and digital billboards, and their inherent ability to present messages and amber alert information in a particular location or area very quickly.

**T**he FBI uses Clear Channel Outdoor digital signs for "Wanted" posters and credits these with the successful apprehension of 20 criminals. Brett Hovington, FBI Community Relations Unit Chief, said, "The versatile technology allows citizens across the country to act immediately when they have critical information for law enforcement."

Virginia Tech and hundreds of other colleges and universities are using visual displays to improve campus safety and security. The systems provide information to students, visitors and faculty about campus events. When needed, they can quickly provide warnings, information or instruc-

tions to displays in different locations. Safety messaging is commonly part of the use of digital signage in public gathering and workplaces because visual messages in multiple languages can be delivered quickly and clearly. The 9/11 Commission report recommended that such notification systems be part of a public safety security solution.

Merritt Allen, CEO of Vox Optima, says, "Digital signage networks not only educate and inform, can also save lives. In an industrial setting, safety messages can run during every shift. And in an emergency, the ability to instantly reach thousands of people can avert disaster."

The Congressional record of April 21, 2009 records the Hon. James L. Oberstar of Minnesota as saying, "As I pointed out in 2006, 'wanted' posters are part of American history, including the pictures I saw in the United States Post Office growing up in Chisholm, MN. The success story of 'wanted' billboards—and the recent recognition from the FBI serves to remind us that outdoor advertising is a significant medium of communication. Madam Speaker, I close with a summation that appears on the website of the FBI: 'Long story short: the billboards are working and working well. And that means a safer America for all.'"



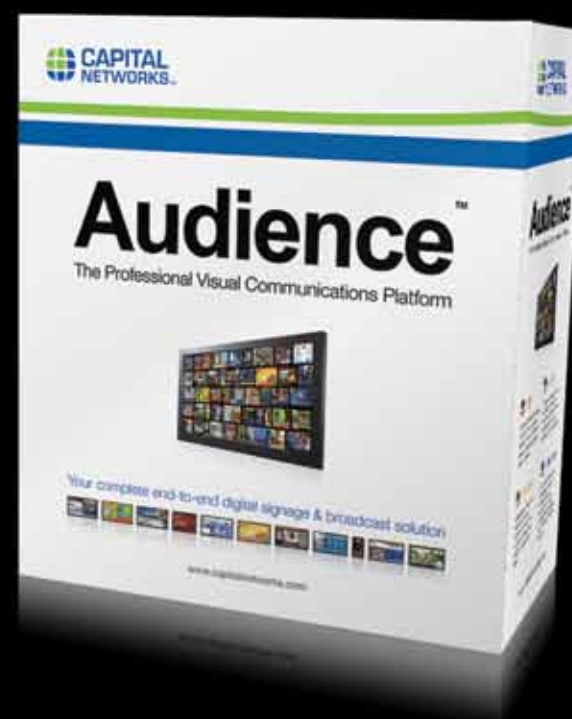
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# The Power Of Digital Advertising

A recent Delta Airlines advertising campaign serves as an example of how impactful digital out-of-home media can be when used as part of an integrated digital media campaign.

Earlier in the year, the airline and its ad agency, Digitas, ran a brand-awareness campaign for Delta's international travel services using digital out-of-home screens combined with traditional media.

Specific results of the campaign indicate that Delta's goals of reaching the target audience and increasing awareness of Delta as a preferred international carrier were accomplished. Specifically:

- Awareness of Delta as an international carrier increased more than 28 percent.
- Among business travelers, the perception that Delta "flies to the international destinations you want

to go to" increased 26 percent.

- The percentage of people "very likely" to recommend Delta to friends, family or colleagues increased 61 percent.
- Overall awareness of Delta increased by 15 percent.

Digitas used SeeSaw Network's DOOH aggregation service and "Life Pattern Marketing," where SeeSaw identifies when and where a certain demographic will see DOOH ads and then assigns ads to networks along that demographic's daily journeys.

"The Delta campaign on SeeSaw's national network demonstrates the power of place and how place-based digital advertising delivers business

results by intercepting a specific audience across multiple touch points during their daily routines," said Suzanne La Forgia, president of the Out-of-Home Video Advertising Bureau (OVAB).

"The net impact of this campaign really tells us three things," said Peter Bowen, "One, place-based digital advertising is effective at reaching audiences in their daily lives. The second is that aggregation provides advertisers a way to reach a large amount of people. And third, this media can be highly targeted to reach a specific audience."

New technology also enables even more highly-targeted advertising by

taking advantage of atmospheric conditions. Accuweather provides data indexes such as weather and allergen reports that, when connected to software, can trigger relevant ads. Not only is a triggered ad, for example an ad for sunscreen when the UV index rises, much more effective and desirable for advertisers, but the fact that it is automatic means that systems run without labor costs associated with monitoring and manually placing ads. The ads can also be triggered from the forecast, and ads can anticipate weather conditions, like hurricanes or blizzards, to alert consumers and encourage buying. It is technology like this that is contributing to the fast-paced growth of the DOOH industry.

A recent survey by the Digital Signage Association indicates that digital signage will continue to grow rapidly, with 82 percent of the 1200 respon-

dents indicating that they will deploy screens in the next two years. Almost 30 percent of respondents plan to deploy 100 or more with 10 percent installing 1,000 or more displays.

Digital signage has truly proven itself to be a cost-effective and powerful tool for communicators.

It is technology like this that is contributing to the fast-paced growth of the digital out-of-home industry.

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# Panel of Experts



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President  
Capital Networks Limited



**ROBERTO MOCTEZUMA**

Vice President and General Manager  
HP Desktop Solutions  
Global Business Unit

Advertisers have long regarded the digital signage marketplace the way commercial fishermen regard fish alone in the sea: catching one may be more trouble than it's worth. That's because advertisers, like fishermen, are accustomed to luring thousands. They won't take the plunge if they have to catch each network on a hook instead of in a net.

It behooves network operators then to connect more screens and interact with ad agencies in the same way as traditional media. Doing so will drive advertising dollars to their networks.

2010 promises to be the year that "digital place-based advertising" bridges the divide between advertisers and available screens. The industry is maturing. Networks are growing in flexibility. Technology is now available to bundle screen networks into larger buys—searchable and purchasable by demographic and other criteria.

NEC's VUKUNET is the centralized, automated web ad distribution platform designed to automatically connect digital place-based advertising with (DOOH) networks.

It reveals previously hidden inventories of screens swimming alone in the ocean. The screens then become part of a larger, more attractive ad buy. New process automation makes it easy. As a result, the digital place-based advertising market is poised to flourish—with a high probability for outperforming current U.S. estimates of two-billion ad dollars in 2010.

Weather has proven to be a top audience draw across all media—and digital signage is no exception! Weather is helping digital signage companies enhance the value of their screens as advertising platforms because it is attractive content that will grab audience attention and hold it as they view advertising messages.

People are interested in the weather for different reasons: traveling, outdoor recreation, or even just to know how to prepare for that day's activities. And weather content is always fresh and up-to-date—exactly the kind of content that will increase viewership and build advertising revenue for digital signage networks.

Here's another way weather serves digital signage: Weather-Triggered Marketing® can provide powerful targeting capabilities. Just as advertisements can be day-part targeted, so too can they be triggered and served according to the weather in the viewer's location.

Advertisements can run in local markets based on current conditions, forecasts, and other weather-related information such as the Arthritis Pain Forecast, the UV index or various pollen forecasts. Is it snowing in the Northeast? People in those locations might see an ad for hot chocolate, snow shovels or a Florida vacation.

The evolution of the digital signage market continues to bring many exciting opportunities to the industry. Use of video across organizations is more prevalent, making network-based digital signage solutions imperative for businesses to grow, communicate, and collaborate with global customers, employees, partners; and to stay competitive in a challenging economy.

Technology maturation is a significant driver. Networks are becoming more capable of media delivery and managing digital signage as one of several video applications. As growth of video applications further accelerates, the network is critical for any integration and optimizing the quality of the experience.

Disparate digital signage networks will be aggregated into the overall network infrastructure. Broader advertising networks will result and advance the ad-supported digital signage model.

The boom continues around technology developer applications expanding the capabilities of digital signage. Compelling partner integrations already built for our Cisco Digital Signs open architecture include video analytics, conference room management, and line queuing.

We are thrilled about the growth potential of the industry. The industry is in the early stages of a multi-year journey to its peak. It is invigorating to help lead this market forward and actively shape the next generation of digital signage networks.

Digital Signage isn't new of course. It's been almost 40 years since black and white TV's appeared in grocery stores! It failed back then for several reasons. In fact, we could easily fill this entire supplement with examples of failed DS projects mainly because of poor planning, execution and a lack of clearly defined goals and economic expectations.

Is anybody really watching and reacting to Digital Signage? Does it make the cash register ring? Is Digital Signage earning sales for one product at the expense of another but not actually growing the profit per square foot?

Digital Signage is now low cost, allowing companies to easily afford it. But just because you can do it, does it mean you should? Can you own and operate digital signage and make money doing it? Absolutely - if you understand accountability, ROI and audience measurement. It's time to be bold and innovative in your operations by launching engaging and personable digital signage. It's close to the customer, and that's close to the sale.

I predict that if you're ready to combine great content, research, accountability and audience measurement, you'll be successful in 2010, testing and launching Digital Signage.

Differentiation has long been a challenge for companies trying to effectively reach customers through today's communications clutter, and that challenge only continues to grow as communication channels become more fragmented by social media. At the same time, customer expectations continue to rise as they demand more relevant, and engaging content that is meaningful to them.

Fortunately, advancements in technology have greatly expanded the capabilities of visual displays, transforming them into true digital signage solutions that can deliver memorable, differentiated experiences with measurable ROI. For example, businesses today can track how many customers are watching their ads and for how long, with recognition and display of personalized, context-aware content coming in the near future.

Only HP can deliver complete and affordable visual solutions that include hardware, software and services from a single, trusted source—and HP is continuing to develop technologies such as intelligent displays with touch interaction as well as complete turnkey solutions that deliver compelling experiences for the enterprise, school or retailer down the block. Many smart businesses are capitalizing on these capabilities to deploy visual solutions that effectively reach targeted groups of customers, employees and other audiences in more engaging and compelling ways than ever before.

# BUNN

Experience, knowledge and contacts are essential elements to “make digital signage happen” successfully. Lyle Bunn is North America’s most highly regarded and “well connected” independent industry consultant.

He is regularly published, often presents at industry and media events and is frequently referenced as an industry and digital signage authority. Lyle Bunn has helped hundreds of organizations plan, implement, use, and benefit from Digital Signage and Digital Out-of-Home media. His consulting, education and facilitation services can help your organization maximize its benefit from this new medium for customer, patron, public, staff or student communications.

Lyle Bunn brings business and project strategy to define “the big picture,” proven processes, the identification and coordination of resources and expert facilitation for sustainable success at the enterprise, business, project and end user levels.



For consultation, “SPEED” training, planning resources and the eBook “Digital Signage Planning Guide” visit [www.LyleBunn.com](http://www.LyleBunn.com)

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