

Influence Inform Entertain

The essentials of digital signage



Digital way finding

Stockholm Kulturhuset invests

Why digital?

The case for placed based media

Bespoke content

Realise the potential of your network

The business end

Displays and other public facing hardware

InfluenceInformEntertain

Digital signage, place based media, digital out of home media – whatever you call it, the practice of replacing static signs and advertising with digital displays is one of the fastest growing sectors in media today.

This publication aims to distil the key elements of any signage network to give the reader insight into the

decisions that need to be made in order to successfully deploy, specify or purchase an out of home network. We have included features on why you should be considering digital signage in the first place, the importance of getting your content right, the display options available and also how you can manage a network once it's up and running. We also have a feature on the concepts

involved in measuring the return on investment.

Whether you're an installer who wants a piece of the action, or you're an end user or facilities manager considering rolling out a new network in your venue(s) we trust that you'll find our essential guide to digital signage informative and helpful.

Chris Fitzsimmons, Editor

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Let's start by tackling the elephant in the room. Digital signage has always had, and still has, an identity issue to the extent that readers from the audiovisual community may already know of, or work with, digital signage by a different name.

There are a breath-taking number of synonyms which include dynamic signage, digital signs, electronic signage, digital media advertising, digital media system, digital signage network, in-store TV network, captive audience network, narrow-casting network, out-of-home media network, digital media network, advertising network and so forth.

Right now, there are three definitions which inform where digital screens are used, as much as what they are used for:

- The Point of Purchase Advertising International (POPAI) trade association has simple and effective definition of 'Digital Signage', which is "a network of digital displays that are centrally managed and addressable for targeted information, entertainment, merchandising and advertising" and this definition is often used when screens are located within a building, say a retail store, a hotel

SCREEN-MEDIA explored and exposed

Chris Heap, managing director of the Imperative Group, explores the origins, and benefits, of taking the digital approach to signage.

lobby, a bar or in offices for example.

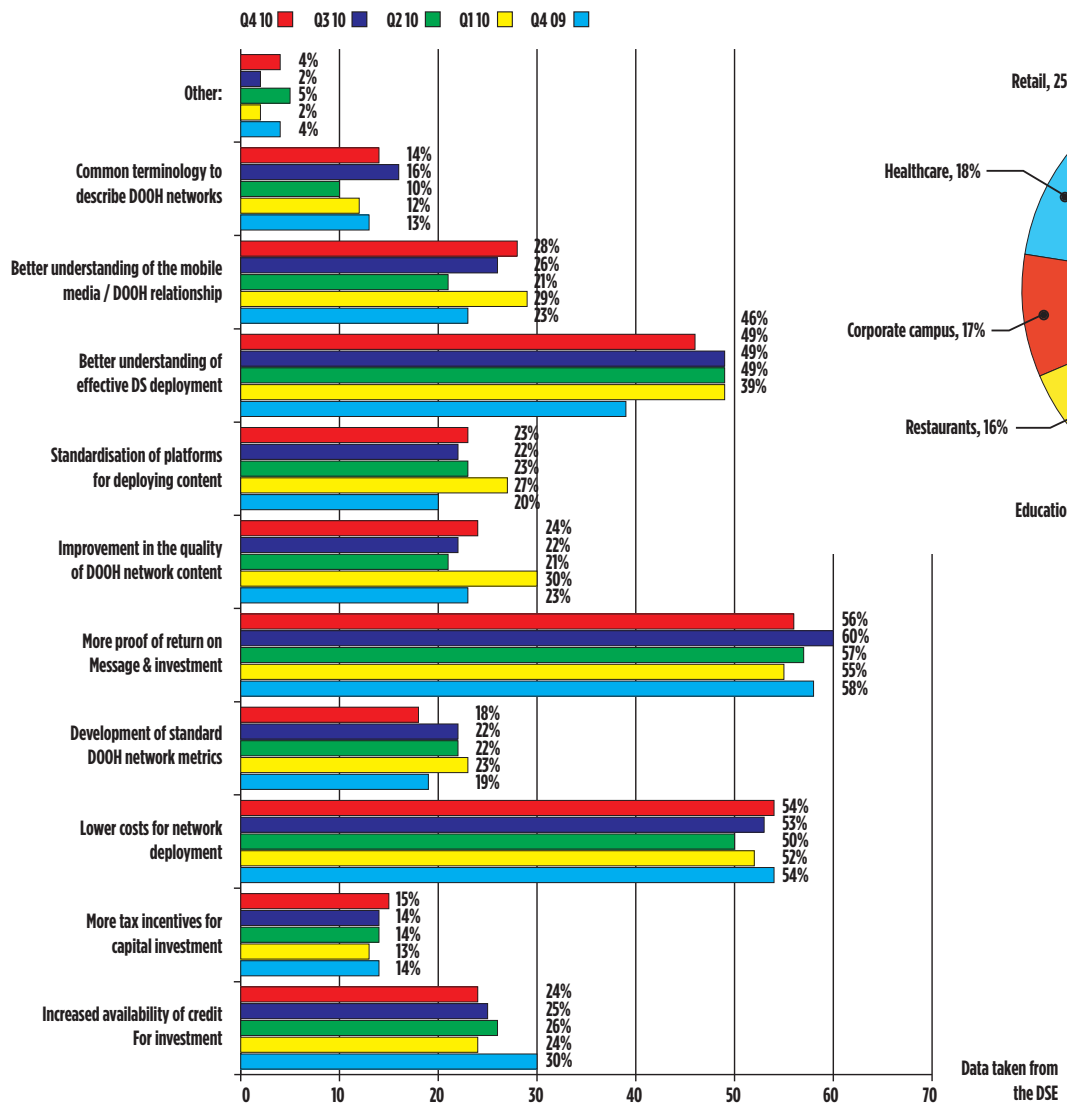
- A further definition, 'Digital Out Of Home' media (DOOH), is a term used by the large outdoor media network owners, such as JCDecaux and CBS Outdoor and relates to the use of digital displays outside a building (malls and stations/airports being exceptions) which include the high-street, buses, trains, trams, stations & airports and large "spectacular" sites, such as London's Piccadilly Circus.
- Lastly, a more recent definition is 'Digital Place-Based Media', which puts digital signage/DOOH and other technologies into a basket where they are able to identify where a user or viewer is

geographically or spatially and provide personalised content on an almost individual basis via technologies that include interactive and augmented reality, mobile and geo-located internet-based services, social and 'user generated' media.

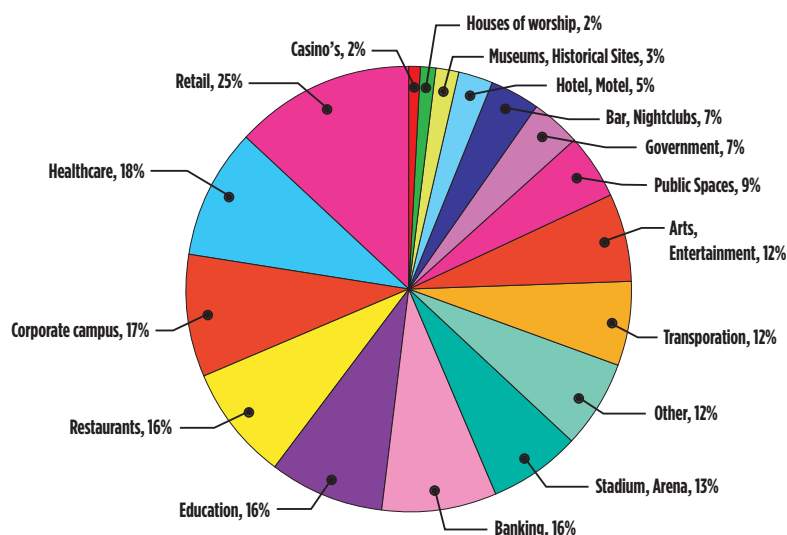
If that's confusing, then let's look at it another way.

What these display and mobile technologies offer is the ability to effectively engage people through a screen of varying sizes and types when they are out of the home travelling, working, shopping or relaxing - so let's call it 'screen-media', because the screen is the common denominator. In its purest form it is the

Which chief developments do you believe will do the most to spur future DS/DOOH network industry growth?



Which categories best describe the venues where your digital signage/ DOOH network is deployed or will be deployed?



So why use screen-media?

More people are spending more time out of the home, working, relaxing, learning and playing: they are harder to reach through traditional means and reaching these people and communicating with them using screen-media is simply a way of following larger social trends in habits, media usage and engagement.

This trend has fuelled growth-media by brands, advertisers and corporations. According to The Outdoor Media Centre, in the UK Digital Out Of Home revenues passed the threshold of £100m for the first time in 2010, reaching €117m, with digital taking an 11.4% share of all outdoor revenues. Europe-wide, ad spend on DOOH in Europe should reach €500 million by 2014, representing 9% of total Out of Home spend according to Screendigest, and worldwide Magna Global predicts a doubling of the market to around €3.7billion by 2016 at a compound annual growth rate of over 15% each year.

This growth is due to three key trends:

- Firstly comes cost reduction. There has been a 50% decrease in technology costs between 2004-2010 due to competition, price reductions and bundling (source: Wirespring, 2010).
- Secondly, research and insight investment. The screen-media marketplace and its brand and end-user customers have invested heavily in understanding the contribution digital signage makes to viewers, users and the businesses who use the media either experientially or from a sales

method of delivering targeted, animated, high impact visual content to viewers via flat panels, projectors and other screen media that engage people when they're out and about, for example:

Broadcast screens are network connected LCD, plasma and projection screens. You may see these in stores, roadside and corporate environments. These are often known as 'passive screens' because there is no physical interaction between the screen and the viewer.

Interactive screens include touch-screens often seen in store windows, on planes & trains and embedded in kiosks and vending machines. Screens can also be made interactive by allowing mobile phone users to play games and interact with content using their handsets (such as QR codes and other scannable devices), or through physical gestures.

Screens that can be worn by a human operative can also be found at sporting and music events, a modern take on the 'sandwich board', either fixed to the chest or mounted on a pole providing advertisers with the opportunity to engage people in previously unreachable environments.

Mobile phones are of course the screen of choice for consumers and much current thinking relates to how screen-media operates in harmony with the mobile phone as a way of understanding precisely who is engaging with media out of the home and how to offer those users value, through the use of electronic vouchers and other incentives.

You may think that screen-media is a fairly new phenomenon. It is and it isn't. The method of using screens to reach people when they're out of the home is tried and tested, but as ever technical advances have sophisticated the way in which this is done.

PROMOTION	INFORMATION	UPDATES	ENTERTAINMENT	EDUCATION	COMPLIANCE
Key retailer & brand product & service promotions (e.g. half price & BOGOF's)	"Solution messages" (e.g. meal, event, seasonal, leisure and fashion solutions)	New product messaging (e.g. coming soon to this store)	Latest music, video, games, ebook and web news, reviews, & trailers	"How to" guides (stay trim/do your make-up/save money)	EPOS and ePOP linked messages referencing stock level
3rd party messages (non competitive brands)	National or local real-time news, weather & traffic information	Product improvement messages (e.g. now with no salt)	Music and video to provide appropriate atmosphere and energy to the store	Ethical trading & corporate information for shoppers	Auto-update of messages when product or service's price changes, is unavailable or sold out
Coupons & discounts (e.g. 10% off toothpaste today)	Product heritage & quality guides (e.g. wine)	Guides to 'what's on' in store or in the local area	Shopper & staff competitions, awards and rewards	Staff training & development (back of house or after hours)	Emergency messages (e.g. fire & evacuation)

perspective. Consequently it has become easier to establish return on investment models, for example in retail:

- Dynamic signage is 28% more effective than static posters at delivering a branded message (source: Infoscreen GmbH)
- In retail, average product sales range between 10-20%, category uplifts between 1-2%
- 77% of viewers recalled screen content
- Shoppers noticed digital media more than any other:*
- 66% digital screens
- 25% in-store audio/radio
- 23% car park advertising (static)
- 20% cart advertising
- 3% floor graphics

**Methodology: Exit interviews containing open and closed questions were conducted by Nielsen Research to 400 shoppers visiting an Edeka store over a two week period. Source: Nielsen & OVAB Europe, 2009.*

- Thirdly we enjoy improved products and processes. Competition and innovation is providing continued feature enhancements and new products. Services that were once provided as heavy-duty enterprise-solutions can now be bought as cloud based solutions on a monthly basis with no minimum

contract. Technical features are standardising and with the emergence of more open source technologies, there is less 'lock-in' to a manufacturer than ever before providing end users with flexibility in securing partner agreements which has significantly lowered the barriers to engagement.

When considered together, these elements provide a more attractive and coherent framework for end users (retailers, corporations, government etc) to make purchase decisions, aided by the emergence of an enhanced eco-system of specialist businesses who are developing and testing the effectiveness of best practices within this common framework.

What's it being used for?

It is important to clarify that digital signage is a "viewer/user engagement tool" and is therefore a media channel first and a technology platform second. Combined, they offer the end user a solution which represents the largest commercial opportunity for systems integrators and other specialists.

Uses vary considerably depending on what the screen-media network is designed to do and many networks have multiple roles, including communicating some or all of the following:

- 1 Public information such as news, weather and local

(location specific) information, such as fire exits and traveller information

- 2 Internal information such as corporate messages, health & safety, news
 - 3 Advertising related either to the location the screen or the viewing audience
 - 4 Brand building to promote brand values and identity
 - 5 Influencing customer behaviour from moving people through a venue to offering a product or a service relevant to them at that time
 - 6 Enhancing customer experiences by reducing perceived waiting time in healthcare, post offices and banks, demonstrating new products, hints and tips or allowing users to interact, play games, post messages and seek offers & deals interactively
 - 7 Enhance the built environment by making the venue look and feel contemporary and modern
- By way of an example, a retailer would use screen-media to deliver various types of content to customers in a store which could be delivered across a number of screens or customer 'touch-points', including broadcast and interactive screens, screens on the shelf-edge, interactive screens in kiosks and ATMs and delivered direct to a customer's mobile phone. Some of the options are shown in the table.

Let's also banish another often misunderstood presumption. Screen-media is not TV. It is sometimes



Intel's concept for the future of places based media in stores.

branded that way because network owners may feel that viewers watching content on a screen feel comfortable watching 'TV' as it is both familiar and trusted but it is designed to do a very different job.

TV is a mass media channel, multicasting to viewers who are often at home and in a different media space, both geographically and psychologically. Screen-media on the other hand provides brands, landlords, network owners and retailers with the ability to deliver highly relevant, timely and appropriate content in the right place at the right time, we call this 'hyper targeted'. It allows what was once 'one message for all consumers' (broadcast media) to become highly personalised: one message per screen per location per time period per person, allowing marketers the opportunity to deliver precise messages to individuals based on who they are, where they are and their interests, desires and needs.

TV builds brands and creates consumer appetite. Screen-media offers viewers and users information they can act on immediately (products on a shelf if in-store) and reflects where they are geographically (sends a coupon if out of the store).

TOMORROW, SCREEN-MEDIA WILL EVOLVE TO REFLECT THE MEDIA HABITS OF ITS VIEWERS AND USERS

TV is HD quality, high bandwidth content. Screen-media content is lightweight (takes design principles from the web) and 'smart' by virtue of the metadata embedded in it so you only get to see what's relevant to you unlike TV which is non-personalised - you get what your neighbour gets (although injecting local or live data into pre-recorded content is emerging, such as live betting odds or ads in between sporting events).

The future

Screen-media is currently going through a particularly evolutionary phase.

Network owners & end users are already developing strategies that unify web, mobile, screen and interactive media into a single programme, powered by one content management system with multiple campaign messages being created and

delivered that are relevant to where a user/viewer is (geography), their intention (psychology), their ability (to research, to visit, to buy) and the technology they've used to see/access that message (mobile, passive screen, interactive screen etc).

Tomorrow, screen-media will evolve to reflect the media habits of its viewers and users and by definition will become a smarter, more effective cross-platform media tool, albeit in the short term more complicated to develop and deploy.

Even so, growth and revenue forecasts point to a bright future for screen-media because it follows the larger trends that inform - from a communications perspective - what people want, when they want it and how they receive it. People are, and will become, more 'technology agnostic' and more 'outcome orientated' and as a result, so will the screen-media marketplace. ↻