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ingenuity, delivered

digital screenmedia development, communication and execution specialists

we create, develop, deliver and promote cutting edge digital screenmedia networks and associated products & services that engage people when they're out of the home travelling, working, shopping and relaxing

www.imperativegroup.com

introducing the imperativegroup

- ◎ The Imperative Group develops and delivers product, service, marketing, project management , business development and commercial services to the retail, media, marketing and digital out of home media sectors

- ◎ We have spent over 12 years supplying intellectual property & know-how to the digital screenmedia marketplace, working directly for network owners, brands, end users and service providers to create profitable commercial enterprises

- ◎ We help customers explore and execute opportunities presented by digital retail media and digital screenmedia products & services

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who we are

◎ We are a 'pure play' digital screenmedia development and delivery agency

◎ We are *completely* technology, process and vendor agnostic

◎ Core team of experts with many years of relevant experience

◎ Hand picked associate experts bring senior level experience and competencies

◎ Strategic alliances add IP/knowledge and operational value

◎ We regularly write and present to 'give back' ideas and knowledge

◎ We are active members of

    ◎ POPAIdigital Steering Group (UK)

    ◎ POPAI Advocacy Committee (USA)

◎ Imperative is based in London

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our positioning

Supplier/vendor marketplace
(Vendors, Creative's, Integrators, Technologists, Solution providers)

End users
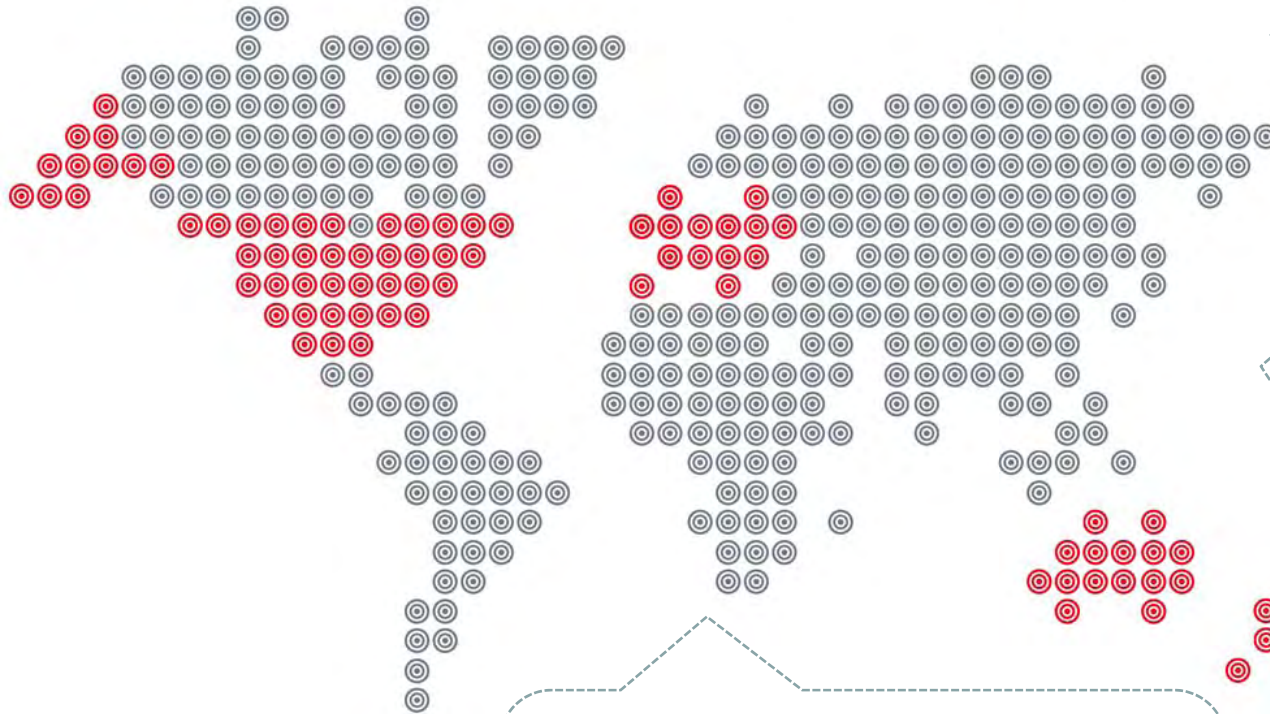*(Retailers, Corporations, Entrepreneurs)*
We accelerate education, & diligence processes, and generate a marketing & commercial starting point specific to their interests

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Imperative
'Bridges the gap' between end users and the media/technical marketplace

We help all parties identify opportunities and deliver commercial advantage

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our scope *(EMEA, North America, Australia)*

Content strategy

Channel Health
i-vu
SELFRIDGES&Cº
TOPMAN
TOPSHOP

Network development

TESCO
LA POSTE
ROYAL OPERA HOUSE
BMW
MGR
meteor
Life channel
Auchan
CTV
SHOWMEDIA
bp
KFC

service development & marcoms

BT iNet
HARRIS
CISCO
SCALA
screenmedia expo | 2011
SONY
St Ives plc
POPAI
THE GLOBAL ASSOCIATION FOR MARKETING AT RETAIL

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our approach

◎ We:

  ◎ help clients improve the odds of making money from digital screenmedia

  ◎ accelerate and lower the cost of launching new digital screenmedia initiatives when the resources or skills may not be available in-house

  ◎ lower risk and gain greater surety about expansion plans or investments

◎ To:

  ◎ rapidly commercialise a new technology, IP, product or service

  ◎ accelerate the performance of existing networks with rapid re-evaluation and execution of new business models, routes to market and partners

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our approach

◎ We can make new businesses happen through great execution and disciplined entrepreneurialism:

  ◎ going faster, earlier revenues, improved return on investment

  ◎ costing less - reduced fixed costs and people

  ◎ transactional learning, piloting, partnering and venturing

  ◎ shared risk and incentives

◎ Using:

  ◎ experienced, specialist teams from an established network with a strong track record of entrepreneurial success and a structured commercial approach

◎ Enabling our clients to:

  ◎ bridge the void of in-market commercial validation, manage risk better, find faster routes to first revenues and justify further corporate and venture capital investment

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definitions

what is this media and why does it matter?

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screenmedia is everywhere

OUTSIDE	INSIDE	IN YOUR POCKET
Digital Out of Home Media*	*Digital Signage**	*Digital Place-Based Media*

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.

"A network of digital displays that are centrally managed and addressable for targeted information, entertainment, merchandising and advertising" relevant when screens are located **within a building**, say a retail store, a hotel lobby, a bar or offices *etc* *(source, POPAI, 2010)*
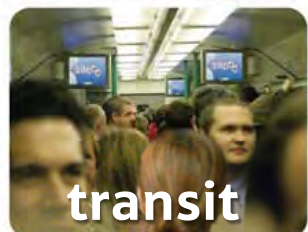
Includes other technologies that provide **personalised content** via interactive and augmented reality, mobile and geo-located internet-based services, social and 'user generated' media.

*Synonyms: dynamic signage, digital signs, electronic signage, digital media advertising, digital signage network, in-store TV network, captive audience network, narrowcasting network, out-of-home media network, digital media network, advertising network
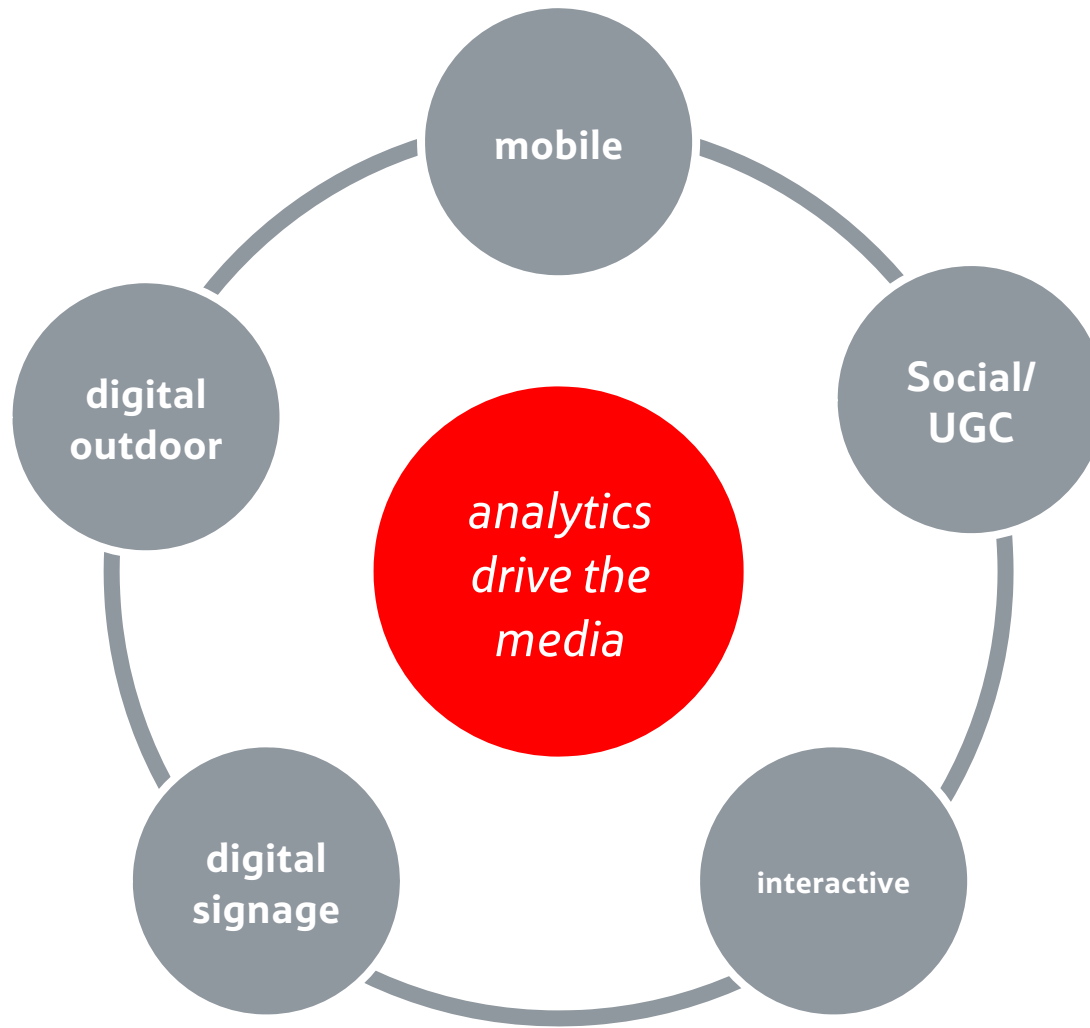
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"screenmedia" ecosystem

- mobile
- Social/UGC
- interactive
- digital signage
- digital outdoor
- analytics drive the media

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confused?

…let's look at it another way

what these display and mobile technologies offer is the <u>**ability to effectively engage people**</u> through a screen of varying sizes and types when they are out of the home travelling, working, shopping or relaxing which is why we call it a *"dynamic, hyper targeted, rich media medium"*

so let's call it 'screenmedia', because the screen is the common denominator

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growth: ~$3.2bn media spend on screenmedia in 2010
(internal brand spend and other revenues remain unaudited)

North America,
$2bn

Europe, $700m

UK, $230m

Germany, $114m

France $86m

Average growth at 15-18% CAGR

Digital now ~10% of all OOH spend, forecast to grow
to 44% of all OOH spending by 2014 *(Adcentricity, 2010)*

"Only two other media are expected to grow more
rapidly: online video and mobile at 19% each"
(Magna Global, 2010)

Russia will be Europe's fastest
growing market by 2015

Sources: Magna Global, 2011 Advertising Forecast; PQMedia Global Digital Out-of-Home Media Forecast 2011-2015;
AdCentricity 2011 Digital Out of Home Media Outlook & Planning Guide.

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notable brands use screenmedia

why develop a screenmedia network now?

Social trends

More people are spending more time out of the home, working, relaxing, learning and playing: they are harder to reach through traditional means

Using digital screenmedia is simply a way of following these changes in consumer habits, media usage and engagement

Cost reduction

There has been a 50% decrease in technology costs between 2004-2010 due to competition, price reductions and bundling

(Source: Wirespring, 2010)

Improved products and services

There is less 'lock-in' today

Services that were once provided as enterprise-solutions can now be bought in the cloud on a monthly basis with no minimum contract

Research & insight investment

It has become easier to establish performance benchmarks

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experience
digital media proposition development

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screenmedia development experience

A summary of the main project types the Imperative Group and its associates have contributed to *(in whole or in part)* as evidence of the experience the team can bring to client projects:

Network development
(business & commercial strategy)

1. CBS Alive (Outdoor, UK)
2. Walmart "Smart Network" (4,000 stores, US)
3. Meteor Mobile Communications (200 sites, IRE)
4. La Poste (1,500 sites, France)
5. BMW Business Television (Europe-wide)
6. Life Channel, (4,500 sites, UK)
7. Corinthian Television
8. Royal Opera House

Content strategy

1. Channel Health (SKY EPG)
2. Tesco TV, (100 stores, UK)
3. I-vu Hair Salons (1,000 sites, UK)
4. Auchan (300 stores, France)
5. Virgin Atlantic (in-flight AV network)
6. Selfridges (4 sites, UK)
7. Topshop (200 sites, UK)
8. KhanShatyr Mall (Astana, Kazakhstan)

Systems design

1. Discovery Channel (UK)
2. Barclays (UK)
3. O2 Retail Stores (UK)
4. Heathrow Terminal 5 (UK)

Service development & marcoms

1. BT iNET/Convergent Solutions (UK)
2. Cable & Wireless Worldwide
3. Harris Corporation (EMEA)
4. Scala Inc (EMEA)
5. Sony Professional Solutions Europe
6. Beyond Digital Systems
7. Screenmedia expo
8. St Ives PLC (UK)
9. Cisco Systems (Global)
10. Telenor

we understand the customer journey
(retail example)

window media to attract

ATM media to target

broadcast screens for reach

personal screen for relevance

shelf edge to engage

audio & aroma to sensualise

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we understand the customer journey
(retail example)

RFID/GPS to connect

content to promote screens

watch as you checkout

facilitate impulse

transact & redeem

generate response

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our experts group

◎ Our commitment is to provide high quality, accountable and measurable working practices, using talented and experienced individuals to add value to your initiative or business

◎ Additional to our internal resource, we can add value by drawing on our exceptional pool of associates and strategic partners on three continents who bring considerable expert knowledge and competencies to provide you and your clients with commercial advantage and first class service throughout the duration of our relationship

◎ Our associates bring a wide range of complementary competencies, skills, knowledge and connections to the team from their experiences as business owners, entrepreneurs, senior executives and managers in the out of home, media, marketing and technical services sectors

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expertise *(specific to Digital Out Of Home)*

Mergers & Acquisitions	**Corporate Finance**	**IPTV & Streaming Content**	**Mobile & Interactive Strategies**	**Proof of Concept/piloting**
Commercial and Business Development	**Trend Analysis**	**Due Diligence, Legal & Compliance**	**Network Design & Management**	**Retail Media Strategy**
Content Acquisition & Syndication	**Go to Market Services**	**PR & Marketing Communications**	**Operations Management**	**Strategic Planning**
Content & Media Strategy	**Insight & Research**	**Media Development**	**Product Development**	**Technical Evaluation**
Communications Strategy	**Interactive Applications**	**Media Sales Strategy**	**Project Management**	**Orientation & Education Workshops**

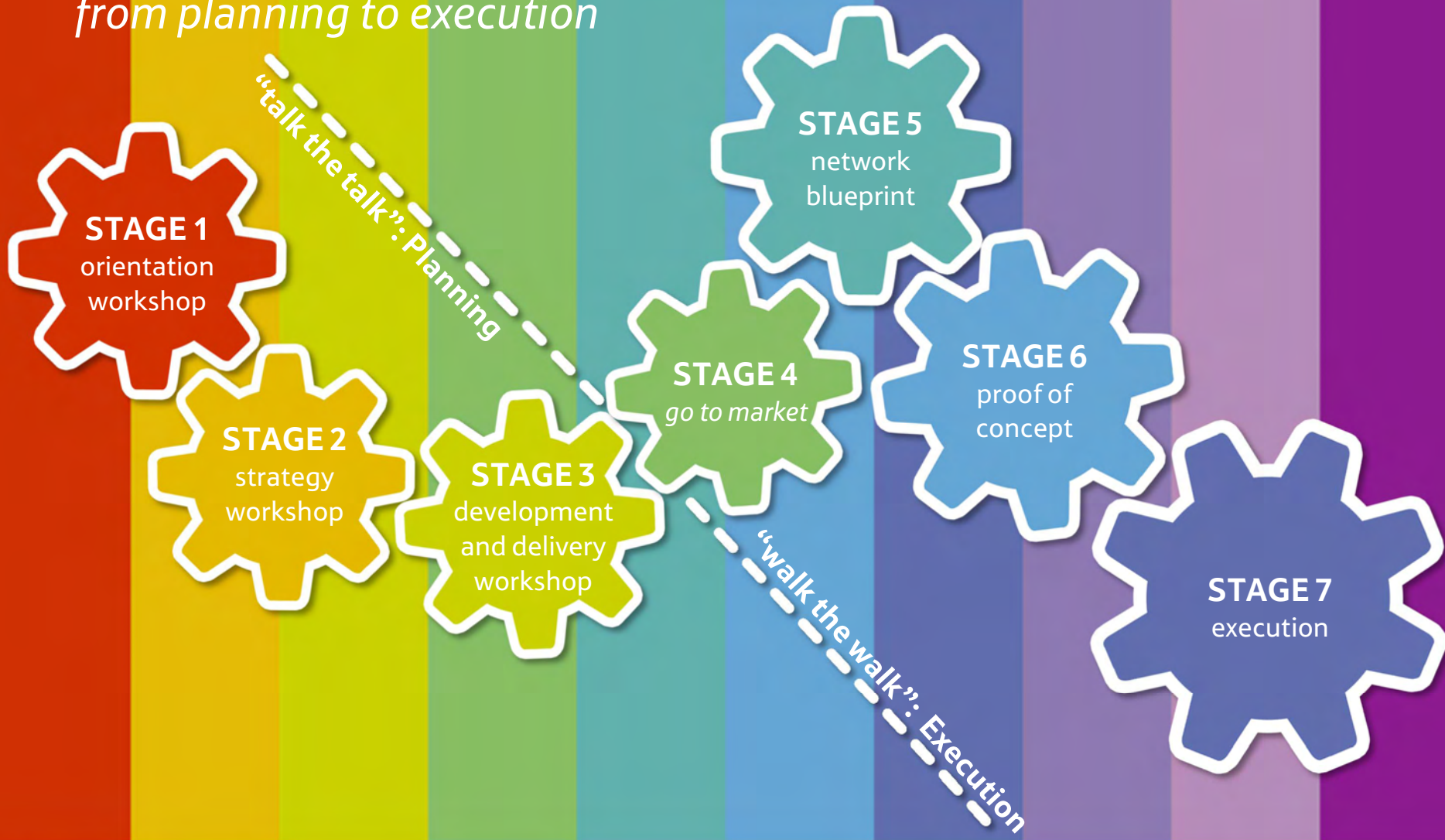www.imperativegroup.com

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offering

leveraging our experience across a wide range of disciplines

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development defined in seven stages
from planning to execution

STAGE 1
orientation workshop

orientation workshop

A one or two day structured classroom orientation to digital screenmedia to set the context of screenmedia within the media marketplace.

The workshop is designed to guide participants *(internal stakeholders and prospects)* through the history, concepts, uses, deployments, best practise, content strategies, viewer benefits and organisational requirements to provide a grounding as part of a typical market assessment process.

It is a marketing & media workshop rather than a technical tour de force.

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development defined in seven stages
from planning to execution

STAGE 2
strategy
workshop

strategy workshop

Designed to help participants and other stakeholders apply ideas, thoughts and opportunities generated by the orientation session into their existing strategy. The intent is to 'ideate' how digital screenmedia and other media can add incremental value and reduce operational processes/costs from existing activity based on plans in a customer's roadmap.

In this private forum, ideas can be created, challenged, tested and developed.

Based on digital screenmedia deployment best practise, development roadmaps and other information, the strategy workshop will clarify where and how digital screenmedia could be applied to an existing roadmap and where change can be best managed.
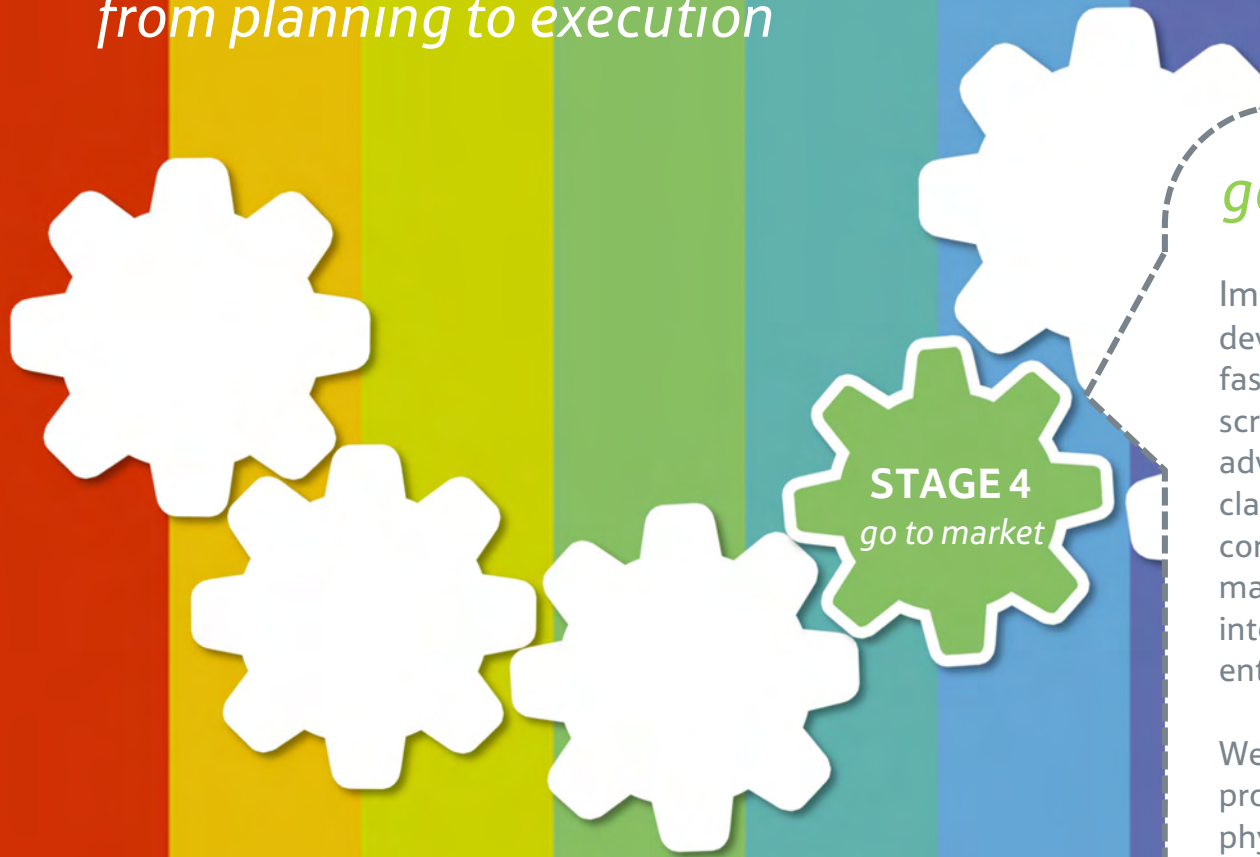
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development defined in seven stages
from planning to execution

STAGE 3
development
and delivery
workshop

development and delivery workshop

Evaluate how best to bring the product, process or programme to life in the most efficient and effective manner.

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development defined in seven stages
from planning to execution

STAGE 4
go to market

go to market

Imperative will deliver a business development programme designed to fast track entry into the digital screenmedia market by developing, advancing & implementing ideas, clarifying the opportunity and the commercial rationale. It is based on market research, analytics and customer interviews to accelerate effective market entry.

We will also create a project team to proactively engage the market, offering physical presence and business development, marketing and face to face support as required.

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development defined in seven stages
from planning to execution

network blueprint

Imperative assesses the commercial opportunity and how it will best be realised by identifying areas of strength, weakness, opportunity and threat to the operational and commercial model.

There are seven stages:

1. Regulation
2. Content and 'rich media'
3. Transport
4. Infrastructure
5. Operations
6. Competition
7. Commerciality

The output is a fully resolved strategic, operational, technical and commercial 'blueprint'.

STAGE 5
network blueprint

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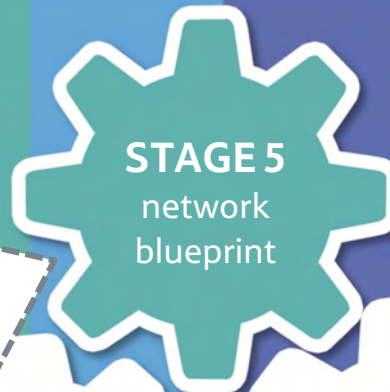
development defined in seven stages
from planning to execution

proof of concept

We will plan, create, project manage, implement and research a proof of concept exercise, whether a full multi-site pilot or the creation of virtualised or physical products/services to be tested with customers.

We will tender, procure, specify, identify and deliver physical assets, create content, deliver operational support, develop key performance indicators and manage any customer research required to prove effectiveness and success.

We will refine the proof of concept until such time as the concept becomes a scalable product.

STAGE 6
proof of concept

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development defined in seven stages
from planning to execution

execution

Once the product becomes scalable, Imperative can manage the project from the earliest stages to a mature ongoing & "steady state" phase.

Imperative can:

◎ support, manage and maintain customer products, processes and assets, or
◎ provide a fully out-sourced service

STAGE 7
execution

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what our customers say *(selected quotes)*

HARRIS

"At Harris we engaged the Imperative Group to provide bespoke market insight relating to the European Digital Signage marketplace. Imperative Group were asked to provide a set of recommendations to help us accelerate our business development programme in key sectors and countries across Europe.

The recommendations, outcomes and packaging of this work were of a high standard and we were very pleased with the outcomes of this exercise. We look forward to working with Imperative again in the future."

Ian Collis, Marketing Director, Harris Systems (EMEA)

MGR

"We approached Imperative to help us plan the business strategy and examine development options in order to create a set of recommendations for a mall customer we were developing a Digital Signage network for.

We were very pleased with Imperative's depth of knowledge, their attention to detail and the professional report they produced which clarified our commercial and content strategy recommendations in order to take the project into a physical phase. We would be happy to recommend their services."

Ivan Kolomoetz, VP Sales & Marketing, MGR Corporation, Russia

what our customers say *(selected quotes)*

SCALA

"Our partners are not just our customers, they are the people who help us improve and innovate our products and services to better match our end-users' needs.

By providing Imperative with a mandate to work closely with our partners, we've been able to generate excellent PR for all parties and in doing so have also been able to develop our partner relationships and share some of the most innovative and successful Digital Out Of Home deployments across Europe back to the marketplace. I'm delighted with the effect this has had to date."

Oscar Elizaga, VP EMEA, Scala

screenmedia expo | europe 2010

"The team at Imperative are well established as practitioners in the Digital Out Of Home market and they have good connections and they understand this specialist media extremely well.

In order to establish a high quality education programme for Screen Media Expo 2010, I engaged Imperative to devise the programme themes and to engage the market in order to bring some of the brightest and best thinkers & doers from around the world to the show in order to add value to the overall proposition. I am very pleased that Imperative were able to deliver a very high quality programme and that has contributed to making the 2010 event the best to date."

Mark Pigou, Managing Director, Screen Events Limited

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some of our screenmedia connections

for more information

for news, press releases, docs and articles visit
www.imperativegroup.com/news.html

to find out more about our team visit
www.imperativegroup.com/people.html

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