



*Digital Signage*  
and  
*Video advertising*  
Networks



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# Digital Signage Technology Evolution

## Yesterday:

High Operational Costs,  
Low Flexibility

## Today:

High Reliability and  
Flexibility, Easy Deployment  
and Operations

## Tomorrow:

Video Surveillance, RFID,  
Cisco TelePresence, etc.

Technology Evolution

New Opportunities

Phase 1:  
Standalone  
PC-Based



Phase 2:  
Networked  
PC-Based



Phase 3:  
Networked Media  
Player-Based



Phase 4:  
"Smart" Signage



Digital Signage Market

# Cisco Digital Media System

## Create

## Manage

## Access



Digital Media Encoder  
1000



Digital Media Encoder  
2000



SA Encoder



Media Experience Engine



Digital Media Manager



Desktop  
Video

Displays



Enterprise TV



Digital Signage Player

## Distribute



Content  
Distribution  
Manager (CDM)



WAE Appliance



ISR-NM

# Converging Technologies: PROM



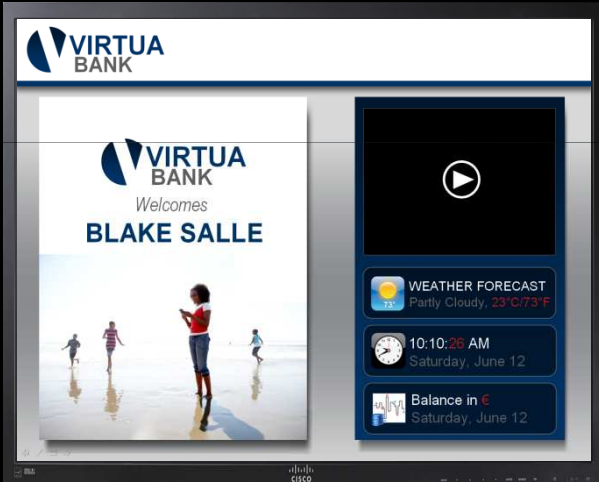
**PROM video analytics technology accurately captures, tracks and analyzes faces, generating real-time audience data:**





# SMART SIGNAGE: RFID

RFID Reader



Credit Card



Digital Media Manager



RFID Content



Content Servers

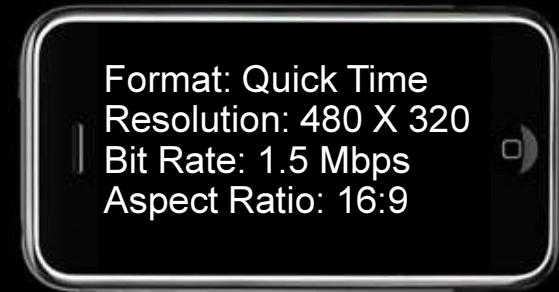
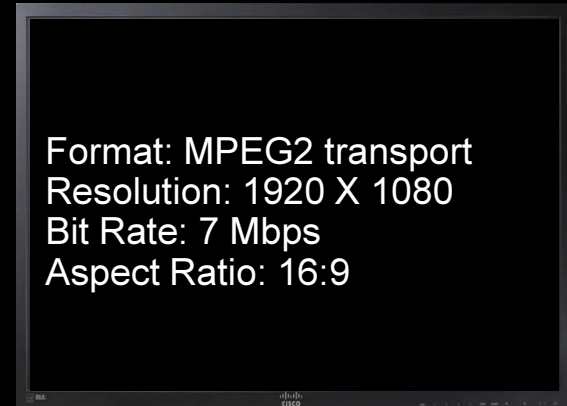


# Personalized Content



# Media Experience Engine

## Any to Any Media Processing



# Study the Opportunity in Italy

## Market transition is happening now

Advertising market starting a transition

- **Demand shift** Different channels: from mass-media to new media (internet, Digital Signage, TLC)

	2007	2008
<b>Above the line</b>	10,062	10,116
Tv, Radio, ...	8,970	9,423
Internet	274	346
Outdoor	818	824
<b>Below the line</b>	10,288	10,593
<b>Total (not the sum)</b>	<b>18,823</b>	<b>19,135</b>

Advertising Market Italian Value in M€ - Source UPA report 2008

- **Offer shift** Different customer's marketing approach: **from 4P** (Price, Product, Promotion, Place) **to 3B** (Buyer Network, Brand, Buying Experience)

And other additional trends:

- consumer habits change: people spend more time out of home - Eurisko
- companies Investment shift from "**Above the line**" (traditional media) to "**Below the line**" (in-store promotion. 70% of buying decisions are instore).

Source OVAB – 2008 Out-Of-Home Video Advertising Bureau



# Video Advertising Networks (\*)

## What's a VAN?

VAN is a Digital Media Networks to deliver advertising and promotion

Business Model: media agencies buys and manage the technology and share the revenue with the customer

Target Vertical Markets are: retailers, gas stations, fairs, airports, malls, gyms, restautants

VAN could be Outdoor (on the street) or Indoor

# VAN Model Actual

Space

N° of contact, audience targeting

ITC Infr

DM Manager, DM Players, Displays, Connectivity, Installation, Maintenance, Insurance

Playlist

Content Management

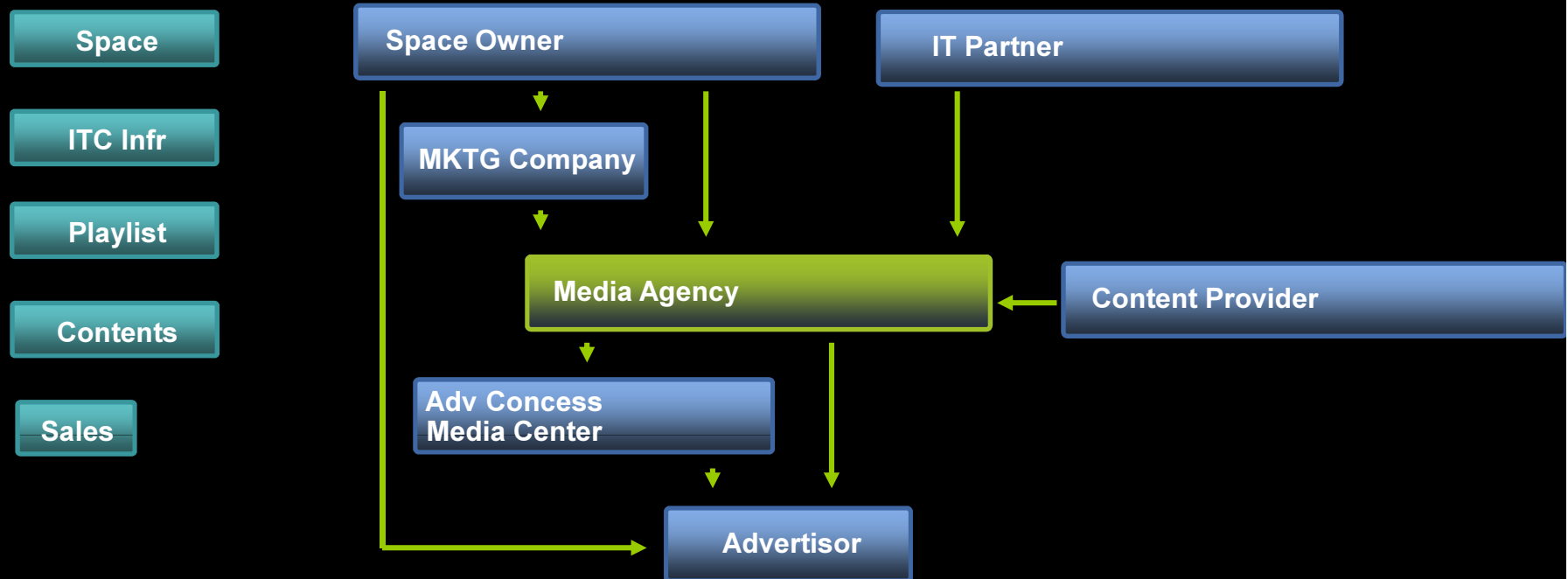
Contents

Contents: Information, Entertainment (or Education), Advertisement

Sales

Ability to create media mix and cross mktg activities

# VAN Model Actual



# Video Advertising Networks: Top Media Success Story



A Video Ready Network to deliver:

- Entertainment
- Promotion
- Information
- Advertising

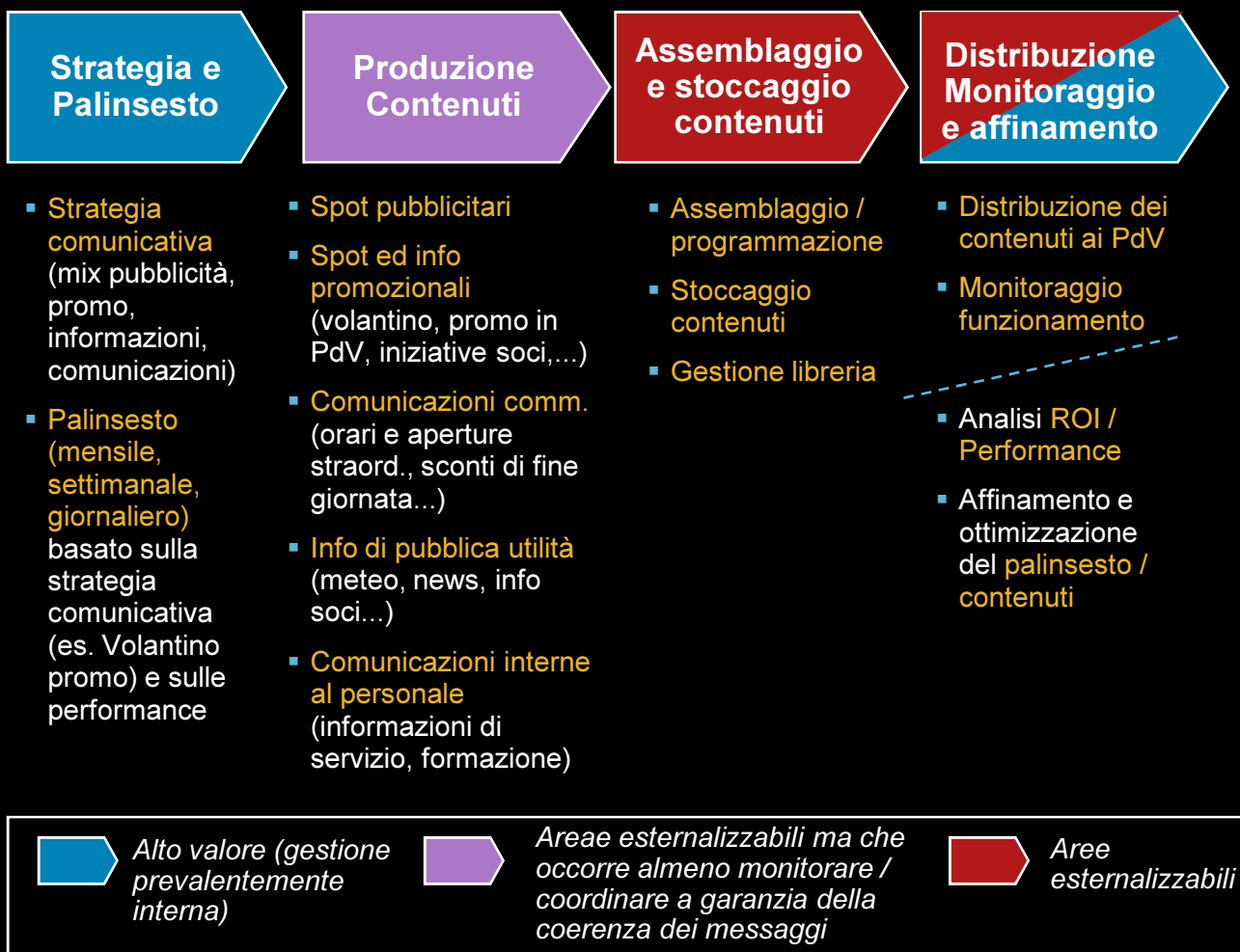


Digital Signage, il business è ad alto share

Top Media Adv, la principale realtà nazionale in ambito Digital Signage, ha scelto una piattaforma basata su soluzioni Cisco e NCR. La tecnologia di brand leader si conforma vincente anche per i mezzi di comunicazione del futuro.

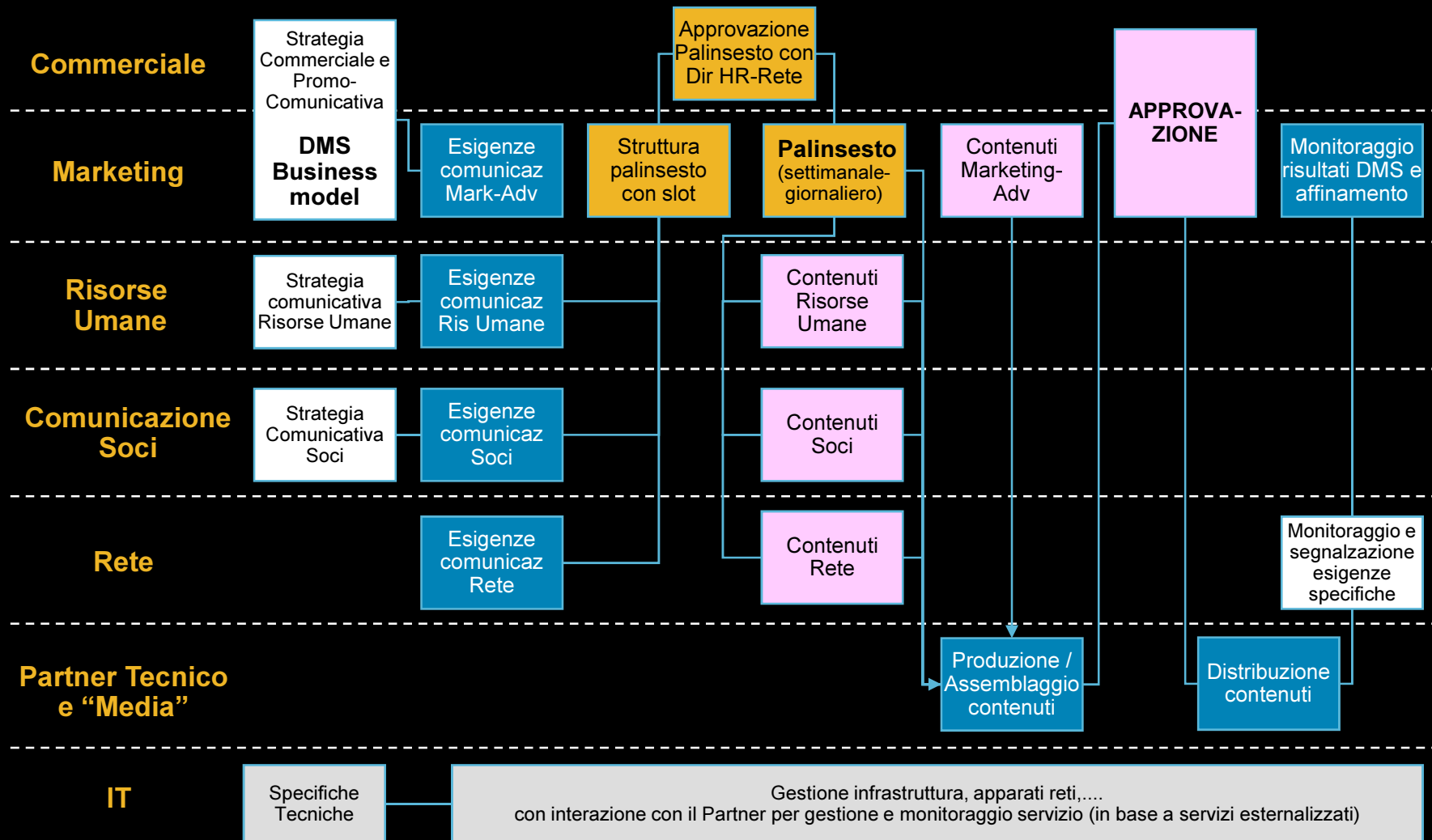
# What's DS for Our Customers?

- **L'infrastruttura DMS** è normalmente di proprietà del Retailer (ma non sempre)
- Una parte consistente delle attività DMS sono spesso date in **"Outsourcing"** (Agenzie pubblicitarie, fornitori di servizi multimediali, ... - - specialmente durante i test e le prime esperienze di implementazione)...
- ...mantendo **in casa le attività di definizione del modello di business, del mix dei contenuti e del palinsesto**



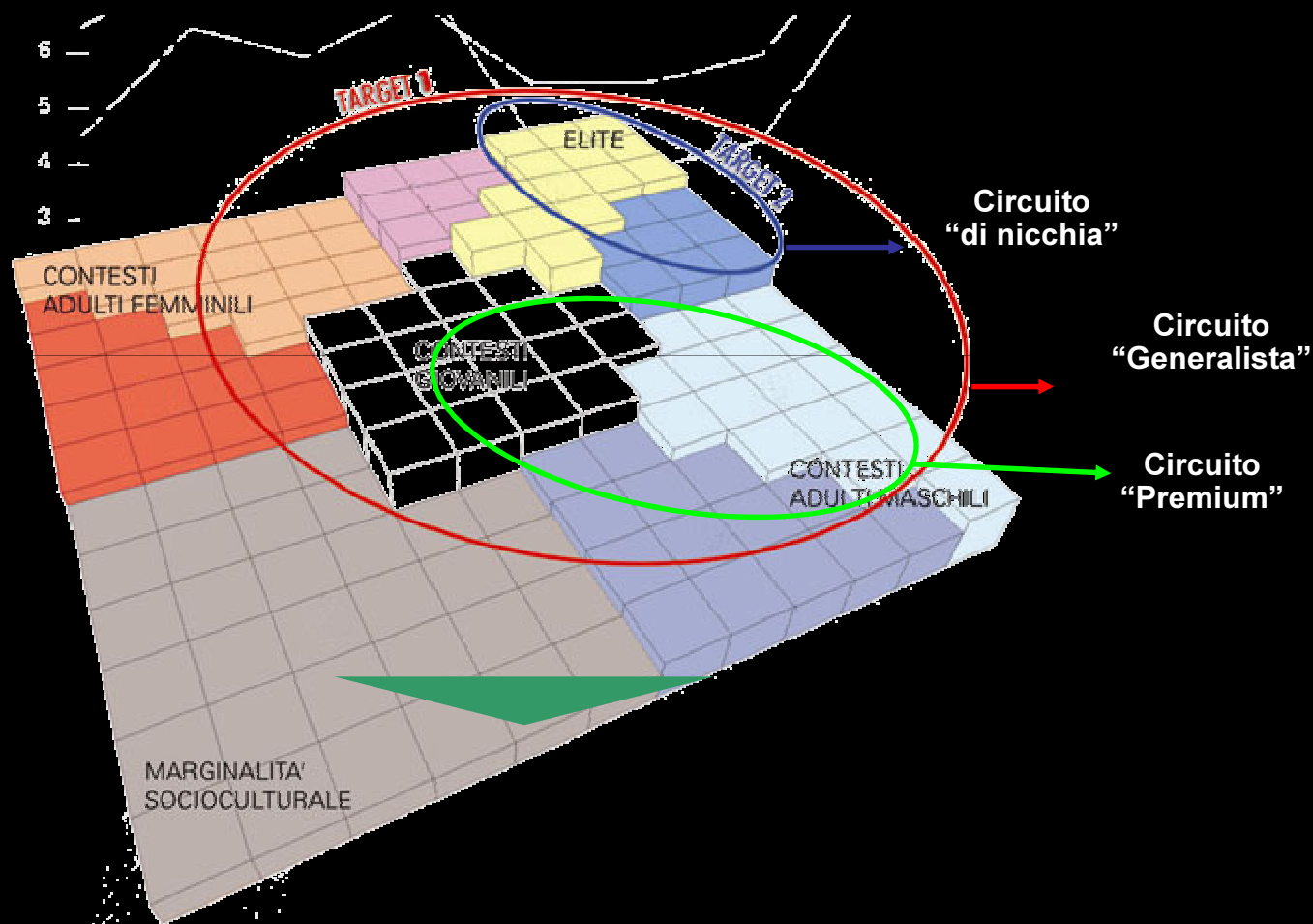


# Digital Signage and VAN Process



# Target Mapping

Il Digital Signage offre l'opportunità di valorizzare una rete di punti vendita, ha caratteristiche uniche in termini targeting e profilazione dei messaggi pubblicitari.



Fonte: Eurisko – Mappa sinottica per la collocazione dei target

Nota: A scopo illustrativo sono stati utilizzati alcuni Cluster Eurisko relativi al background socio-economico e culturale della popolazione

# Grazie



Welcome  
to the  
Human Network.