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数字传媒的契机

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大屏将成手机指示牌

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Screens will Become "Signposts" for Mobile

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From DOOH to Screenmedia

DOOH is evolving rapidly, moving from what was once a unicast -style of media delivery (one message to all screens) to a far more sophisticated multicast system more akin to online, where each screen has the capability of being treated as its own channel, combining working practices from web and social media to deliver live, relevant and targeted messages with feedback mechanisms for data capture.

The market has changed so much -that in the last twelve months we - defining our business as a "DOOH" or "Digital Signage" development agency because in our opinion those definitions are too restrictive in terms of where screens are located and the devices consumers use to access the information they require.

Today we favour the term 'Screenmedia', which we define as, "A fully customisable communications platform that enables viewers & users to connect, trade and respond to targeted content through integrated technologies including broadcast & interactive screens, kiosks and mobile devices". For us, Screenmedia should be used to complement strategic brand, merchandising and advertising campaigns to extend tactical reach, e.g. deliver specific content based on the user profile, location, interests, purchase habits and redemption requirements.

Embed Screenmedia in Business Operations

The big opportunity for end users (such as retailers in this example) today is to integrate all of its digital messaging across multiple digital channels into a system or process that tracks customers along the path to purchase through online, pre-store, in-store,

从数字户外到屏幕媒体

当前，数字户外发展迅速，它正在从以往那种单一传播（或广播，一对多的信息传递）的媒体传递方式演变为一个更为复杂的、更加类似于在线的多路传播系统，我们可以把每一块屏幕都当作是一个频道，结合使用网络和社交媒体的工作方法来传递实时、相关并且精准的信息内容，与此同时，屏幕的反馈机制也能帮助采集实时的数据。

在过去两年里，市场变化如此之大，以致在过去一年当中，我们已不再将自己定义为"数字户外"或"数字标牌"

post store and back online again and in this regard, Screenmedia can play a big part in most of this journey in helping customers make better decisions about what to buy and from whom.

Just ask Walmart if they feel their network (branded the Walmart Smart Network) is delivering value to their business and you'll be presently surprised by how positive their executives are, however they would also say that the decision making process to use this media is much less about IT capability these days but more about the impact using such media has on a shopper or employee with considerations including how to accelerate sales, help transfer knowledge to staff, improve a store experience or help a brand convey its personality.

The challenge for Screenmedia practitioners is to work out how to make screen-based media relevant to that customer journey and embed it as part of a wider suite of digital tools used by retailers and corporations to convey messages to the viewer or user as dynamically, relevantly and impact-fully as possible.

Historically, one of biggest barriers to adoption of Screenmedia was (and to some extent still is) generating profitability when the capital cost of installing and maintaining enterprise systems was unsustainably high.

Today's biggest barrier is to reconcile how Screenmedia can become an embedded part of a retailer or corporations operations rather than a bolt-on. This becomes ever more important when you consider that the driver for adoption is ultimately the collection of data that can be used to optimise the commercial relationship between the consumer and retailer (or brand, or corporation) as well as offering an improved customer experience.

3 Trends Drive Screenmedia Market Forward

There are three major trends that are helping move the market forwards, both technical and commercial.

The shift from enterprise to SaaS services is, in my view, revolutionary for the market and whilst it's still a work in progress, what it does do is lift significant capital cost out of the commercial model, making the initial investment much more palatable and improving

的发展机构，因为在我们看来，这些定义局限了屏幕所能安装的位置以及消费者能够用来获取他们所需信息的各种设备。

今天，我们倾向于使用"屏幕媒体"一词，所谓屏幕媒体，就是一个能够让观众和用户通过整合性技术如广播与互动屏幕、广告亭以及移动设备等来对定向的信息内容做出反应、产生联系乃至交易的可以完全定制的传播平台。对我们而言，屏幕媒体应该用来辅助战略性的品牌建设、商品销售和广告活动，以延伸品牌策略性的到达率，比方说，它可基于用户信息如所在位置、兴趣爱好、购买习惯和偿付要求等来传递特定的内容。

将屏幕媒体嵌入经营活动之中

终端用户（如零售商）如今面临的一大机会，就是将所有跨数字媒体渠道的信息整合到一个系统或是过程之中，在线上、店前、店中、店后，对购物途中的消费者进行动态追踪。在这一点上，屏幕媒体能够帮助消费者更好地做出买什么和到哪里买的决策，它在消费者购物途中扮演着极为重要的角色。

如果你问沃尔玛有关它的屏幕网络（又叫沃尔玛智慧网络）为它所带来的价值，你将会惊奇地发现，他们的领导对网络的建设是多么的积极。然而，他们也会强调一点，今天，商家决定是否使用某一媒体，一般会较少去考虑 IT 能力方面的问题，而会较多地来考虑使用该媒体以后能够对顾客和员工产生何种影响，包括促进销售，传授员工知识、提升进店体验或者帮助品牌传递其个性等。

对屏幕媒体的从业者和供应商而言，一大挑战就是如何让屏幕媒体和消费者出行路线相关，将它作为零售商和企业所使用的数字化工具的一部分，嵌入其中，尽可能动态、相关以及有效地将信息传递给观众或用户。

一直以来，阻碍行业采用屏幕媒体的最大因素之一，就是安装和维护企业系统的资金成本过高，以致获利颇为困难。

今天，行业最大的障碍就是如何使屏幕媒体成为零售商或企业的嵌入式部分，而不是一种附加的产物。这点很重要，尤其是考虑到促进屏幕媒体应用的因素，其中之一就是媒体数据的采集最终能够用来优化消费者和零售商（品牌或企业）之间的商业关系，同时也能提供一种改良的消费者体验。

the likelihood of the business case being able to generate sustainable profitability. Any costs, both in terms of hardware of software, that can be removed from the customer's premises, hosted and managed remotely and "connected" in some way to the rest of business (i.e. to EPOS, to stock information, to external data feeds etc) makes Screenmedia significantly more attractive in terms of improving operational simplicity and, we would hope, cost effectiveness. Ultimately it means network owners/ operators can scale up (or down) quickly, that they can better control the technology at the head end (e.g. in-store) and they don't need to be locked into proprietary agreements on equipment they can buy themselves from their own suppliers.

The second is the shift towards leasing or rental models, where all 'enterprise' hardware is leased from a financial organization rather than bought outright. This model greatly softens the initial capex requirement, enables network to scale to suit requirements, enables in-place upgrades at end of life without massive cost and by keeping costs as low as possible it ultimately improves the opportunity to generate sustainable profit.

Lastly, the convergence between complementary technologies is a driver for growth. As previously mentioned, Screenmedia now sits in a box called "multichannel media" and it needs to co-exist and co-operate with online, mobile, social and interactive media. It's fair to say that while the market works out what best-practice looks like in how these media co-operate, what is clear is the convergence of these media is inevitable. This provides a significant opportunity for corporations and retailers who use data & analytics to drive their messaging strategy but also poses significant challenges for the Screenmedia community – the question is how does the Screenmedia marketplace look outside of its silo, recognize these trends and engage with the wider media community. Some practitioners are already doing so and winning traction with clients who understand that working this through is a work in progress but are willing to invest time in developing an

三大趋势推动屏幕媒体向前发展

目前，以下三大主要的趋势正在从技术上、商业上推动市场向前发展。

首先就是从企业服务到 SaaS（软件即服务）的改变。在我看来，这种改变虽然仍在进行之中，它对市场的影响却是具有革命性的。它能从原有的商业模式中显著地节省资金成本，让初期的投资更易于被人所接受，提高商业案例获得持续盈利能力的可能性。用户那里可以免去任何有关硬件和软件的成本，这些软硬件能够实现远程的内容托管和管理，并且以某种方式连接到其它的业务（电子销售点、股票信息、外部的数据服务等），这一切使得屏幕媒体在提升操作的简易性方面独具魅力，也更具成本有效性。最终，这意味着网络所有者／运营商能迅速按比例增加或减少屏幕的数额，他们能够更好地在前端（店内）控制屏幕科技，而无需被他们与供应商所签订的设备专有协议所局限。

第二就是向出租或租赁模式的转变。所有企业硬件都可以从金融机构租用，而不是直接去购买。这样一种模式极大地减轻了企业初期的资本支出，让企业调整规模以适应资金方面的要求，实现媒体的就地升级，无需花费大量成本，将成本控制在尽可能低的范围内，最终增加企业持续盈利的机会。

第三，各种互补性技术的融合将推动屏幕媒体的继续增长。如之前所述，屏幕媒体现在处于一个多媒体环境中，它需要与在线、手机、社交和互动媒体共存并且一起合作。可以说，虽然市场还在试图找出这些媒体如何合作的最佳做法，显而易见的一点却是，这些媒介之间的融合将是必然的趋势。这为那些使用数据和分析来推动信息策略的企业和零售商提供了巨大的机会，同时也为屏幕媒体行业提出了巨大的挑战，问题是屏幕媒体市场如何突破自身的隔离，认可这些趋势，与更广范围的媒体圈子建立起关系。一些从业人员和供应商已经在这样做了，并且赢得了客户的支持。客户知道这样的工作仍在进展过程中，但是他们愿意投入时间来寻求相应的解决之道，以通过为他们的顾客或员工提供一种独特的数字化体验来增强自己的竞争优势。

answer to give them competitive advantage by offering their customers or staff a unique digital experience.

Emerging Technologies to Enhance Customer Experience

In the future, Screen media networks will be far more proactive in the way in which they are designed to adapt messages in order to optimise response rates. They will be fed with real-time information from brands, retailers and corporations that enhance its ability to convert this data through sophisticated algorithms in order to offer real-time, relevant and rewarding information that helps viewers or users make better decisions, save time and saves money. The best example of a Screenmedia network that provides a fully personalised customer experience that is properly integrated with the built environment and retail merchandising strategy is the Miele Inspirience Centre in the Netherlands. (Refer to more info of Miele case by scanning the QR code here)

Of course, there are emerging technologies such as QR, NFC, augmented reality and apps that enable users to control screens in order to play games with each other remotely. Whilst these add to the viewer/ user experience and will have a growing significance in the specification of networks in the future their commercial or experiential impact today is small.

Screenmedia Is a Media First and a Technology Second Proposition

The biggest challenge to the Screenmedia marketplace is not technical, it is how it is sold and to whom it is sold. Screenmedia is a MEDIA first and a TECHNOLOGY second. The key performance driver is how good the network is at generating a response from its viewers or users that can be monetized, ENABLED by technology but not predicated by it.

Often the IT is sold with very little consideration of the business benefits for the client – how it help optimize their business, contribute to revenue generation and perhaps streamline existing processes (thus removing cost through de-duplication).

新兴科技增强受众体验

未来，屏幕媒体网络将显得更为主动，可以做到适时调整其信息内容以优化其响应速度。它们可以收集到来自品牌、零售商和企业的实时信息，加强其通过精密的演算来转换这种数据信息的能力，以提供实时、相关以及有益的信息，帮助受众或用户更好地做出决策、节省时间和金钱。

荷兰 Miele Inspirience 中心的案例（更多信息请拍摄本页二维码），应该是屏幕媒体网络可以提供一种完全个性化的消费者体验，并且与建筑环境和促销策略完美结合的最佳案例。

当然，新兴科技如二维码、近距离通信、扩增实景和应用程序等，能够让用户控制屏幕，相互进行远程游戏。虽然这些科技增强了受众／用户的体验，而且会在未来的屏幕网络规范中具有越来越重要的地位，但是在今日，它们的商业或实际影响却仍然很小。

屏幕媒体的第一属性是媒体，而非技术

对屏幕媒体市场而言，最大的挑战不是技术性的，而是媒体如何来销售、向谁来销售的问题。屏幕媒体首先是一种媒体，然后才是一项技术。它的关键绩效驱动因素就是看它能从受众或用户当中产生多大的回应，而且这种回应应该可以借助技术来实现货币化而不仅仅是一种预测或断言。

IT 方面的销售通常较少考虑到客户的商业利益，比如，该产品如何帮助客户优化其生意、产生收益或者简化已有流程（通过数据去冗来降低成本）等。

一直以来，我们都遇到一个问题，就是一些注重"短期销售"的科技公司主导了整个数字标牌／屏幕媒体市场，他们常常向那些不具需求，或者从来不用（或不懂）所购技术之功能的客户销售产品或服务。最终，客户往往会发现自己所购的产品价格过高，产品也没有得到充分的使用，以致萌发生发懊悔之心，当下次决定购买屏幕或其它相关科技的时候，他们可能就再也不会从原有的那家供应商进货了。

在不少会议上，常常听到客户如此说，"我们购买了所有的设备，然后供应商负责安装，但是我们真的不知道该如何来

The issue that we come across all the time is that the digital signage/Screenmedia marketplace has been (and still is) dominated by "short-selling" - technology companies selling products or services to customers who often don't need, or will never use the functionality of the technology they are buying (but know no better so accept it).Eventually they learn enough to work out that what they bought was overpriced or underutilised, creating 'buyer's remorse', the outcome of which is they probably won't buy from that vendor again, if they buy screens or other related technology at all.

How many times have I sat in a meeting where a client has said "we've bought all this equipment and the vendor's installed it, be we really don't know what to do with it, how to use it or how it benefits our business" … sometimes I truly believe more consideration is given to the color of the soft furnishing in their reception area than what a multi-million dollar investment will do to add value to their business…and this is mainly because vendors still don't know how to help customers deliver a proper benefits analysis before the deal is done.

We overcome this by working with the customer to hold their hand at the initial stage, tailor a 'measured solution' to fit their needs and create long term relationships that over time, yield greater (and better quality) revenues for the supplier and it works - when client are informed they take more ownership internally, invest more time and money in seeing it succeed and embed it deeper in their business.

Screens will Become 'Signposts' for Mobile

The biggest shift as I see it is that large format screens will become 'signposts' for mobile (already technologies have emerged that enable users to control some of the content on large format screens, we see integration of social media and gameplay).

As signposts, large screens will evolve to promote the use of a mobile app, persuade the user to turn on location services or 'digitally engage' with a screen or a store. In order to increase smartphone interaction & engagement, you need to demonstrate the mobile user what the benefits of engaging are. The challenge

image courtesy of the Imperative Group

屏幕媒体，就是一个能够让观众和用户通过整合性技术如广播与互动屏幕、广告亭以及移动设备等来对定向的信息内容做出反应、产生联系乃至交易的可以完全定制的传播平台

处理这些设备，如何使用它来为我们的生意带来效益。" 有时，我相信客户考虑他们接待处装饰品适合用什么颜色的时间，远远超过他们考虑一笔数百万美金的投入能够为他们的生意带来何种价值的时间。其中的主要原因，就是供应商在完成一项交易之前，尚不知如何帮助客户来做一个适当的利益分析。

通过在项目起始阶段就与客户携手，根据他们的需要来量身定做相应的解决方案，创建一种长期的合作关系来为媒体主创造更高（更有质量）的收益，我们解决了以上常见的一些问题。这种做法极为有效，当客户了解了产品以后，就能获得更多的项目内部所有权，愿意投入更多的时间和金钱来保证项目的成功，并且将产品更深地植入其生意之中。

户外屏幕将成手机 "指示牌"

照我看来，大屏幕演变成为手机的指示牌，将是数字户外发展的最大变化。目前，用户借助一些新兴的科技已经能够控

is that today, only a handful of mobile users switch on Bluetooth, a smaller percentage have (and use) NFC and of course any campaign must be 'opt-in' for it to be legal (at least in the UK and U.S). Screenmedia can bring the digital proposition to life and in doing so accelerate mobile engagement/sign-up/app downloads etc which I believe will be a fundamental role of Screenmedia in the medium term.

The drivers for this are too complex to go into any great detail here, suffice to say that mobile is a pervasive technology, it is highly prized by its owner and with personalised data shared, can provide fantastic depth of knowledge regarding what the user does, where he goes, what he buys, who he interacts with etc. Internal positioning systems (IPS) and Wi-Fi networks will also allow retailers and corporations to track phones indoors, meaning that information, messages and offers can be conveyed to each individual owner at the precise time they enter a room, walk along an aisle or visit the in-store pharmacy.

The added -benefit is that users "bring their own device", so rather than network owners or retailers having to spend a considerable amount of money on screens and IT to broadcast digital media to every square foot of space, fewer - tactical screens designed to promote app downloads and mobile engagement will ultimately perform more effectively at generating customer adoption. A few years ago, Wal Mart reduced the numbers of screens per store by~ 50% but improved its content offering, the result was a more effective network generating greater revenue with lower capex costs leading to improved profitability.

Our retail customers are already looking very closely at how to convert existing 'offline' customers into 'online' - but not at home, they want to talk to customers when they are out of home. They want to generate new data, enable screens (large and mobile) to offer even more personalised messages not just based on who the user is but where they are thus improving message relevancy to the where they are along the customer journey (pre, during or post shop for example).

Looking at the whole picture, it is clear that the only screen that is consistently in proximity to the customer

制大屏幕上的部分内容，实现社交媒体、游戏与户外的整合。

作为指示牌，户外大屏将继续演变以促进手机应用程序的使用，同时鼓励用户选择它所提供的信息服务来与它或商店建立起一种数字化的联系。为了提高智能手机的互动和参与度，你需要向手机用户展示互动参与所能带来的利益点。其中的一大挑战，就是现在只有一小部分的手机用户开通了蓝牙、使用 NFC（近距离通信），当然，任何合法的户外互动广告都必须是双向许可式的（至少在英国和美国是这样）。屏幕媒体能够为数字化的传播提案注入活力，加速手机的互动参与／签到／应用下载等，从中期来看，我相信这将是屏幕媒体所要扮演的一个基础性角色。

推动以上变化的因素甚为复杂，在此难以一一细说。可以说，手机是一项普遍的技术，它深受用户喜爱，以用来分享个人化的信息，它能提供有关用户行为与动向、购买物品与互动对象等方面的深度知识。内部定位系统以及 Wi-Fi 网络也能让零售商和企业在室内追踪手机用户，这就意味着，商家可以在特定的时间将信息、内容和优惠券等传递给每一个特定的手机用户，如当他们进入某一个房间、走过一个通道或是光顾某药店时等。

在以上情况当中，用户都带着他们自己的设备，这也是手机所能带来的额外利益点。媒体主或零售商不必在屏幕和 IT 上大量投入，以将其信息广泛告知受众，事实上，只需少量可以促进应用程序下载、提升手机参与度的更具策略性的屏幕，就能更为有效地获得消费者的回应。数年之前，沃尔玛将它每个店里的屏幕数量都减少了 50%，但是提升了其内容服务，结果，一个更为有效的网络诞生了，它能以更低的资本支出成本创造出更大的收益，其盈利能力也随之得以提升。

我们的零售客户正在密切关注这一点，即如何在户外将已有的线下消费者转变为线上的顾客。因此，他们想要收集新的数据，让屏幕（户外大屏和手机）能够提供基于用户信息（身份和所在位置等）的更为个性化的信息，进而在消费者出行的不同地点如店前、店中或店后，提高所要传递信息的相关度。

总体看来，很明显，移动设备是唯一能与消费者一直接

is their mobile device. Therefore understanding how mobile media inter-relates with static screens is a vital part of the selling-in process if you are a vendor selling to retailers/corporates or an advertising agency selling network airtime to third party brands.

Digital City is a By-Product of Digital Lives

In 2011, I invited Christine Outram from MIT SENSEable City Lab to speak at Screen media expo in London on the topic "Mash-up metropolis: key trends for the media savvy city". Her view, put simply, is that cities of the future will be digitally interconnected and we will be able to do things within the urban environment not considered before, all because the digital revolution has produced a layer of networked digital elements that has blanketed our environment, and lent our cities new layers of functionality.

We can already see this taking shape. Tesco in Korea has turned what was once "dead time" (waiting for a subway train) into an opportunity to shop for groceries by scanning product QR codes printed on vinyl wrapped around the platform with their mobiles. This is not strictly speaking 'DOOH', but it easily could be.

Today, we can engage with Screenmedia content in cabs, on stations platforms, on street furniture, in public conveniences, in stores, in banks, in the subway - in fact pretty much anywhere.

I think the extent to which we as consumers become 'connected' to each other, as well as to the built environment will depend upon how easy it is to do so and the value that is exchanged. Consumers understand that in order to receive value they need to trade some data; the big question will be whether their return on investment justifies that exchange and this 'transaction' is something brands and consumers are only just starting to work out.

Ultimately, the digitisation of our cities is simply a by-product of us digitising our own lives, consequently you could argue that every space in every place is going through the same transformation. What is most interesting to me is that this battleground isn't taking place anywhere near the Screen media marketplace but in the social media sphere, enabled by mobile.

近的屏幕媒体。因此，如果你是向零售商／企业卖产品的供应商，或是向第三方品牌卖广告时间的广告公司，那么，弄明白移动媒体如何与静态屏幕相互关联将是你销售过程中至为关键的一部分。

数字化城市是数字化生活的副产品

在2011年，我邀请了麻省理工大学感知城市实验室的Christine Outram来伦敦参加屏幕媒体展览会并发表演讲，题目就是"混搭都市：媒介化城市的几大关键趋势"。简单说来，她的观点就是，未来的城市将实现数字化的互联互通，我们将能在城市环境中做以往所无法想象的事情，因为数字化革命所产生的这样一层网络化的数字表层已经覆盖了我们的生活环境，为我们的城市披上了一层又一层全新的功能性外衣。

我们可以看到，这一切都正在成形。韩国的乐购超市将以往的"停滞时间"（等地铁的时间）变成了一个购物的机会，消费者只要用手机扫描地铁海报上的产品二维码就可实现购物。严格说来，这还算不上是数字户外，但是借助手机，它很容易就可以成为数字户外。

今日，我们可以在出租车、站台、街道设施、公共厕所、商店、银行、地铁等几乎任何地方与屏幕媒体内容展开互动。

我想，我们消费者之间、消费者与建筑环境之间能够在何种程度上相互连接起来，将取决于实现这种连接的难易程度，以及他们之间所交换价值的大小。消费者明白，他们必须交换一些自己的数据资料才能得到一些有价值的信息内容。问题是，消费者的投入回报（ROI）是否能够充分证明这种交换的价值，因为这种交易对品牌和消费者而言，都还只是刚刚开始。

最终，数字城市只是我们实现数字化生活后的一个副产品，由此可见，我们周边每一个地方的每一寸空间都将经历同样的数字化变革。我觉得最有意思的是，这样一场变革的战役并没有在屏幕媒体市场上演，而是由手机所发动，在社交媒体领域正式拉开了序幕。ACM