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North American Digital Signage Index

Volume 1, Issue I

4th Quarter 2009

North American Digital Signage Index

Index Component	Current DS Index (change vs. last quarter)		Near-Term DS Index (3-6 month outlook)	
	Value	% Change	Value	% Change
Firm Sales Revenue	133.05*		150.85*	13.38%**
Firm Average Selling Prices	106.78*		108.47*	1.59%**
Number of Firm Employees	96.61*		123.73*	28.07%**
Capital Expenditures	88.98*		116.10*	30.48%**
Industry Business Activity	125.42*		144.07*	14.86%**
Screens Deployed in Network	116.95*		127.12*	8.70%**
Screens Deployed in Industry	116.10*		136.44*	17.52%
New/Expanding DOOH Networks	110.17*		119.49*	8.46%**
Ad Spending on DOOH Networks	103.39*		122.03*	18.03%**
Total Change	110.83*	10.83%**	127.59*	15.12%**

Index by Sub-Segment

Sub-Segment	Current DS Index (change vs. last quarter)		Near-Term DS Index (3-6 month outlook)	
	Value	% Change	Value	% Change
Software Firms	117.29*		134.10*	14.33%**
Hardware Firms	107.13*		128.05*	19.53%**
DOOH Networks	118.25*		137.69*	16.44%**
Professional Service Firms	88.98*		124.89*	14.47%**
Captive Networks	108.41*		114.59*	5.69%**
Content Firms	116.95*		123.93*	20.12%**
Agencies/Brands	111.88*		129.14*	15.43%**

The Current DS Index measures changes in the reported level of business/industry activity during the third quarter 2009 versus the second quarter 2009.

The Near-Term DS Index measures estimates for changes in business/industry activity over the next three to six months.

*Numbers are raw index scores. A score of 100 indicates neither growth nor a decline in the industry as compared to the prior period. A decline or value under 100 indicates a deteriorating or negative industry outlook. An increase or value over 100 indicates an improving or positive industry outlook.

**The percent is the change relative to the prior quarter.

NOTE: The second quarter of 2009 is the base quarter of 100. As the second quarter is the base year, over/under scoring of third quarter results may occur. This is a one-time event that will be self-correcting in the first quarter 2010. This statistical anomaly does not apply to the Near-Term DS Index.

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Steven Keith Platt, Director and Research Fellow; Kevin King, Director of Research; and Justin Greenfield, Intern and Doctoral Student, are responsible for this Report.

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Background

The Platt Retail Institute (PRI), in conjunction with its affiliate, the Chicago School, has developed the North American Digital Signage Index (NADSI). The NADSI measures changes in the sentiment of industry experts regarding business/industry activity levels in the digital signage industry on a quarterly basis.

The NADSI has two components. The first is the **Current DS Index**, which measures changes in the reported level of business/industry activity during the third quarter 2009 versus the second quarter 2009. The second is the **Near-Term DS Index**, which measures estimates for changes in business/industry activity in the digital signage industry over the next three to six months.

Survey participants represent a broad cross section of industry leaders, comprising seven industry sub-segments including: software, hardware, DOOH networks, professional services, captive networks, content providers and agency/brands. PRI will be conducting the survey on a quarterly basis. The first survey was conducted during the third quarter 2009, and released in the fourth quarter 2009.

PRI created the NADSI because as the digital signage industry continues to grow, there is a need to measure activity from period to period. The NADSI measures the current and expected rises and falls in industry activity. As such, the NADSI will be an important source of market information, and also will raise broader awareness for the industry.



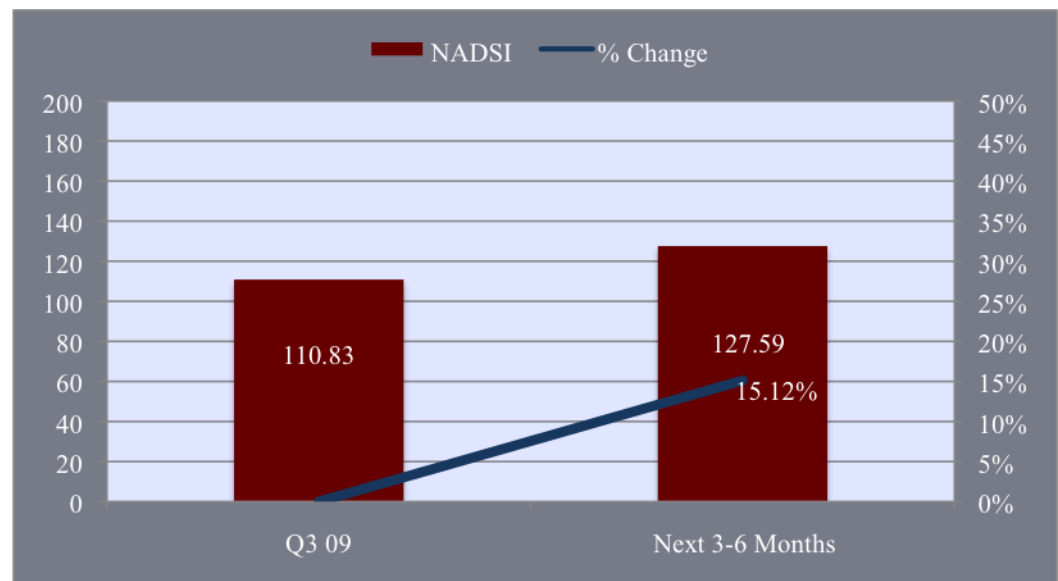
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Commentary

The change in the Current DS Index for the third quarter is 10.83 percent above the second quarter 2009. This level of industry activity, in the midst of a major economic downturn, illustrates the underlying demand for the industry's products/services. Of the nine Index components, sales revenue and business activity registered the largest increases, while the capital expenditures and hiring components declined the most.

The change in the Near-Term DS Index for the third quarter is 15.12 percent. This reflects an optimistic outlook for the industry over the next three to six months. Of the nine Index components, the sharp rebounds in planned capital expenditures and hiring demonstrate that firms are ready to invest heavily in anticipation of future growth. Estimated increases in selling prices (which outpace the rate of inflation), and the level of new/expanding networks increased the least, but were still in positive territory.

Chart 1: Change in NADSI



Sub-Segment Index

The following charts depict the Current DS Index scores and the Near-Term DS Index scores for each of seven industry sub-segments.

Sub-Segment Current DS Index: DOOH Networks (+18.25 percent) and Software Firms (+17.29 percent) recorded the highest change in the reported level of business/industry activity during the third quarter 2009 versus the second quarter 2009 (see Chart 2).

Sub-Segment Near-Term DS Index: DOOH Networks (+37.69 percent) and Software Firms (+34.10 percent) recorded the highest change in the estimated level of business/industry activity over the three-to-six month period (see Chart 3).



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Chart 2: Sub-Segment Current DS Index

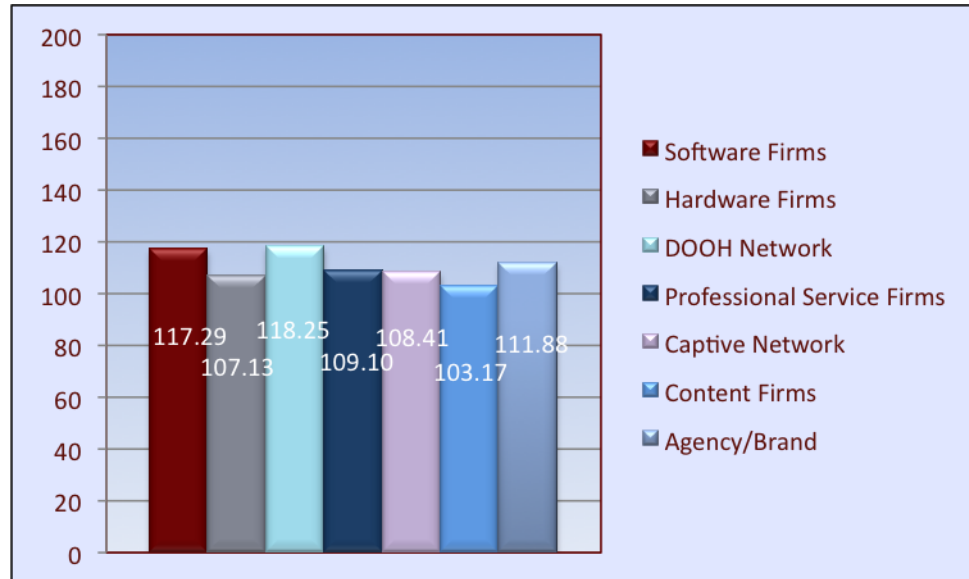
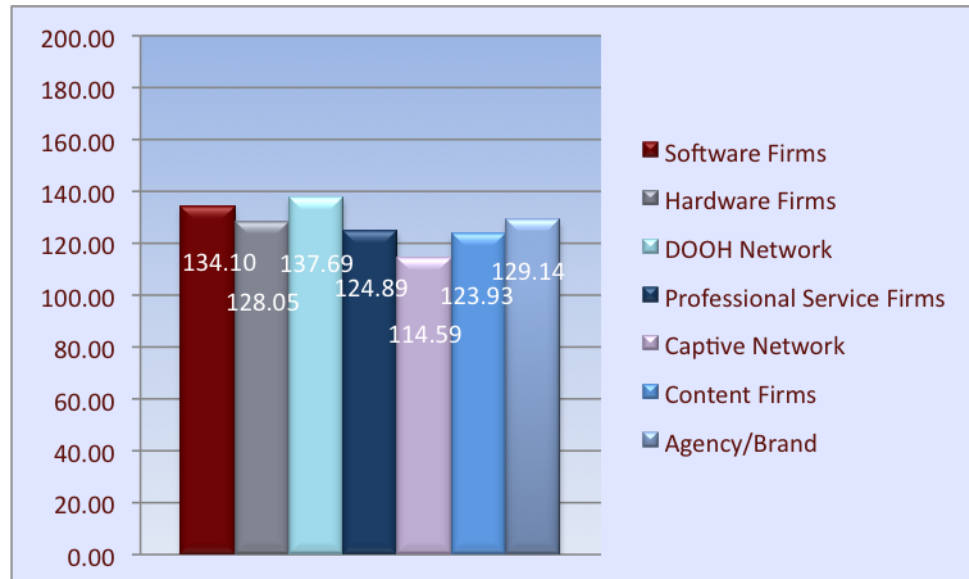


Chart 3: Sub-Segment Near-Term DS Index



Responses to the subjective questions posed to participants found that financial concerns, proof of effectiveness, market share and staying current on emerging trends and business practices are major concerns for business managers. For the industry as a whole, issues surrounding acceptance of the media, standardization, and overexposure must be confronted. Similarly, measurement, network reach, and cross-network standardization are important challenges viewed as faced by ad-supported DOOH networks.

The Current DS Index substantially outperformed five major benchmarks. These include U.S. Gross Domestic Product, Retail Sales, Total Advertising Revenue, Internet Ad Spending and Out-of-Home Revenue.



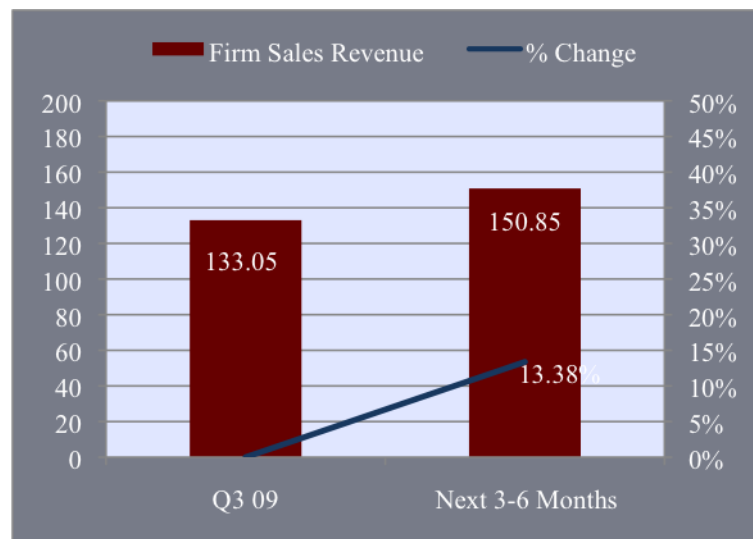
Index Component Performance

Firm Sales Revenue

The change in company sales for the third quarter is 33.05 percent above the second quarter 2009. To offer another perspective on firm sales for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 40.00 percent of respondents reporting that revenue in the third quarter 2009 was slightly higher than during the second quarter; 21.70 percent reporting that revenue was about the same; and, 18.30 percent reporting that revenue was much higher.

The Near-Term DS Index estimate for change in company sales over the next three to six months shows an expected increase of 13.38 percent when compared to the third quarter 2009.

Chart 4: Firm Sales Revenue



NOTE: As previously indicated, because the second quarter is the base period, over/under scoring of third quarter results may occur. This is a one-time event that will be self-correcting in the first quarter 2010. This statistical anomaly does not apply to the Near-Term DS Index.

Firm Average Selling Prices

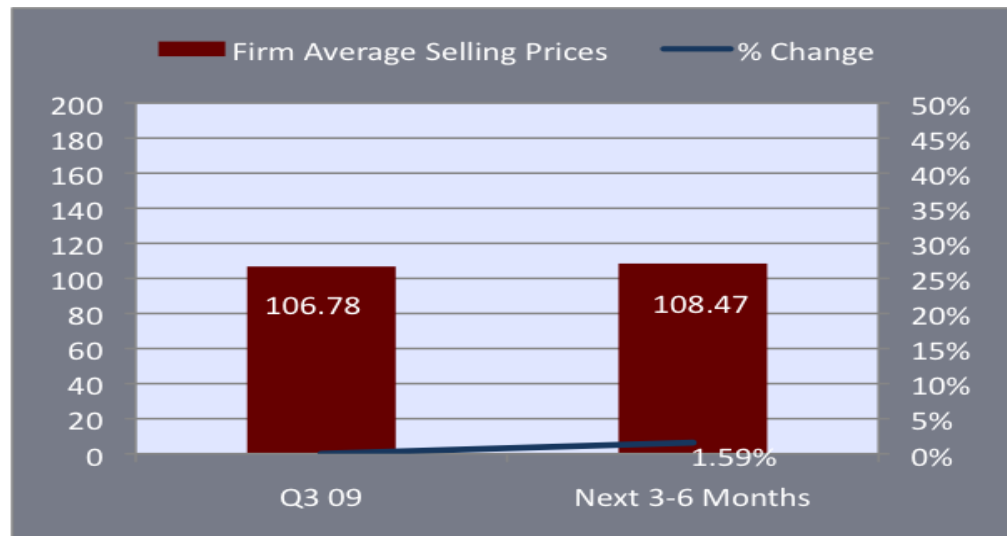
The change in selling prices for the third quarter is 6.78 percent above the second quarter 2009. To offer another perspective on firm average selling prices for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 63.30 percent of respondents reporting that firm average selling prices in the third quarter 2009 were about the same as during the second quarter; 16.70 percent reporting that firm average selling prices were slightly higher; and, 3.30 percent reporting that firm average selling prices were slightly lower.

The Near-Term DS Index estimate for the change in prices over the next three to six months shows an expected increase of 1.59 percent when compared to the third quarter 2009. When contrasted to the Consumer Price Index, which fell by 0.20 percent for the 12 months ending October 2009, this would indicate that price increases are expected to outpace inflation.



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Chart 5: Firm Average Selling Prices

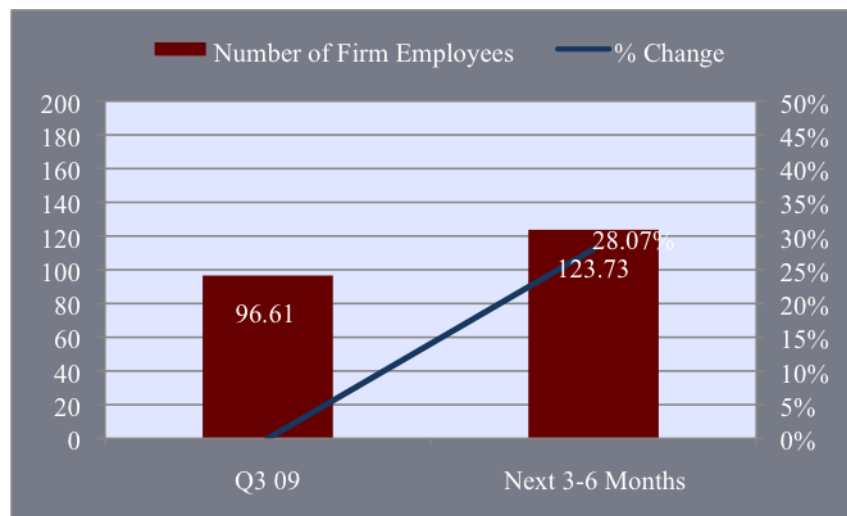


Number of Firm Employees

The change in the number of employees for the third quarter is 3.39 percent lower than the second quarter 2009. To offer another perspective on the firm number of employees for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 55.00 percent of respondents reporting that the number of employees in the third quarter 2009 was about the same as during the second quarter; 18.30 percent reporting that the number of employees was slightly lower; and, 15.00 percent reporting that the number of employees was slightly higher.

The Near-Term DS Index estimate for the change in the number of employees over the next three to six months shows an expected increase of 28.07 percent when compared to the third quarter 2009. When contrasted with a current unemployment rate of 10.20 percent, this indicates that firms are aggressively building for the future.

Chart 6: Number of Firm Employees

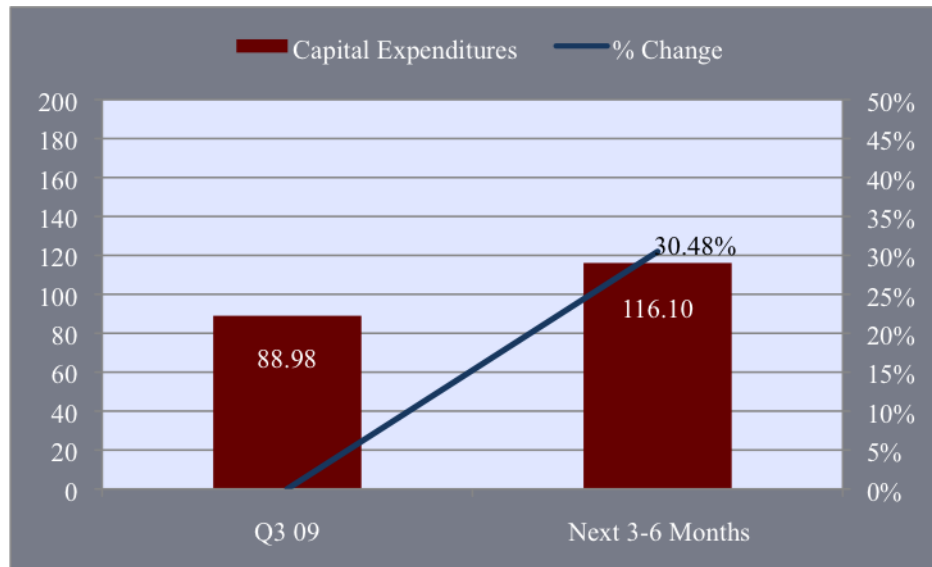


Capital Expenditures

The change in capital investments for the third quarter is 11.02 percent lower than the second quarter 2009. To offer another perspective on firm capital expenditure for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 48.30 percent of respondents reporting that capital expenditures in the third quarter 2009 were about the same as during the second quarter; 18.3 percent reporting that capital expenditures were slightly lower; and, 10.00 percent reporting that capital expenditures were slightly higher.

The Near-Term DS Index estimate of the change in the level of capital investment over the next three to six months shows an expected increase of 30.48 percent when compared to the third quarter 2009. When contrasted with a 20.80 percent third quarter year-on-year decline in the U.S. rate of business investment, this again indicates the very positive outlook these firms have for the industry's future.

Chart 7: Capital Expenditures



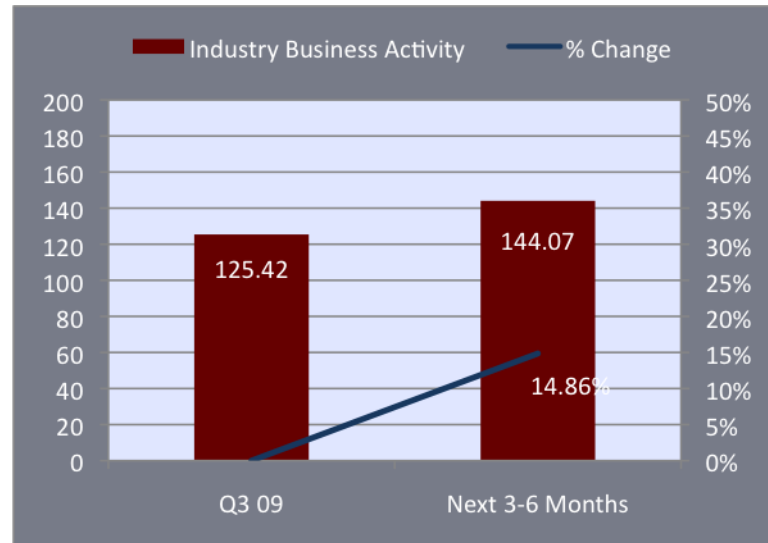
Industry Business Activity

The level of business activity for the third quarter is 25.42 percent above the second quarter 2009. To offer another perspective on the level of business activity in the industry for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 45.00 percent of respondents reporting that the level of business activity in the third quarter 2009 was slightly higher than during the second quarter; 26.70 percent reporting that business activity was about the same; and 11.70 percent reporting that business activity was much higher.

The Near-Term DS Index estimate for the change in business activity over the next three to six months shows an expected increase of 14.86 percent when compared to the third quarter 2009.



Chart 8: Industry Business Activity

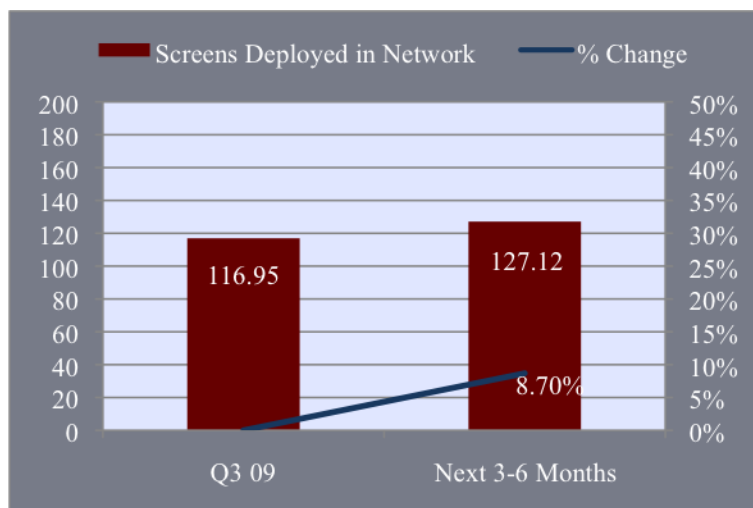


Screens Deployed in Network

The change in the number of screens deployed by operators for the third quarter is 16.95 percent above the second quarter 2009. To offer another perspective on the number of screens deployed in network for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 21.70 percent of respondents reporting that the number of screens deployed in their network in the third quarter 2009 was about the same or slightly higher than during the second quarter; and, 10.00 percent reporting that the number of screens deployed in their network was much higher.

The Near-Term DS Index estimate for the change in the number of screens to be deployed by an operator over the next three to six months shows an expected increase of 8.70 percent when compared to the third quarter 2009.

Chart 9: Screens Deployed in Network

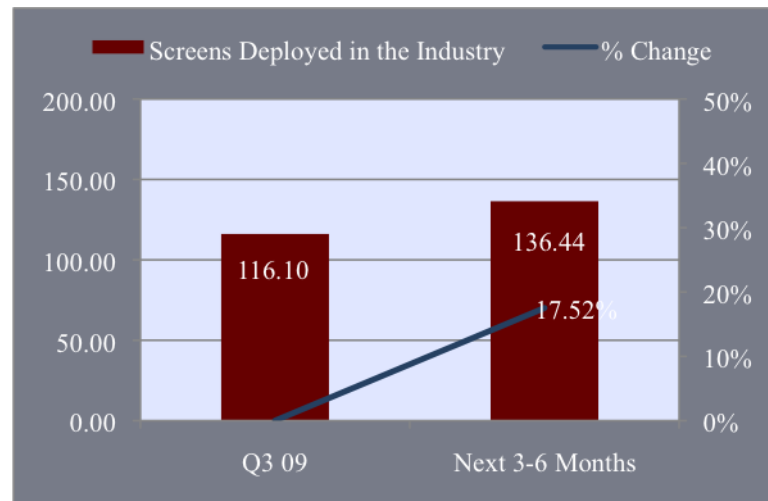


Screens Deployed in the Industry

The change in the number of screens deployed in the industry for the third quarter is 16.10 percent above the second quarter 2009. To offer another perspective on the number of screens deployed in the industry for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 30.00 percent of respondents reporting that the number of screens deployed in the industry in the third quarter 2009 was about the same as during the second quarter; 26.70 percent reporting that the number of screens deployed in the industry was slightly higher; and, 8.30 percent reporting that the number of screens deployed in the industry was much higher.

The Near-Term DS Index estimate for change in the number of screens to be deployed in the industry over the next three to six months shows an expected increase of 17.52 percent when compared to the third quarter 2009.

Chart 10: Screens Deployed in the Industry



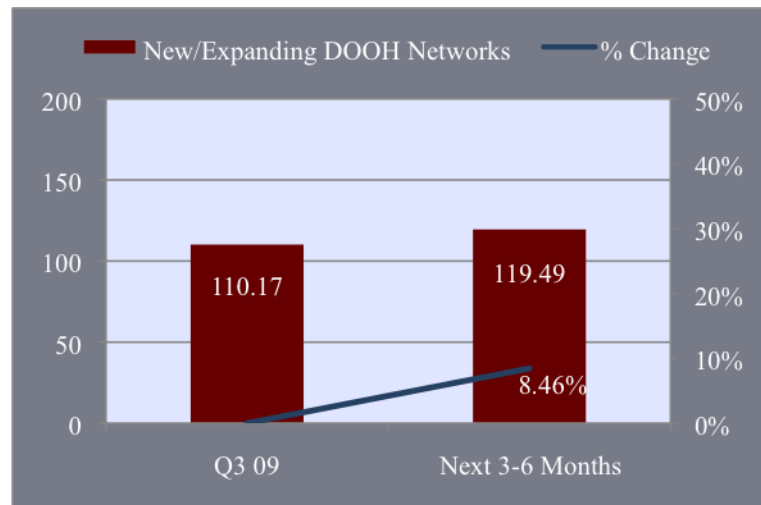
New/Expanding DOOH Networks

The change in the number of new/expanding DOOH networks in the industry for the third quarter is 10.17 percent above the second quarter 2009. To offer another perspective on the number of new/expanding DOOH networks in the industry for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 33.30 percent of respondents reporting that the number of new and/or expanding DOOH networks in the third quarter 2009 was slightly higher than during the second quarter; 20.00 percent reporting that number of new and/or expanding DOOH networks was about the same; and, 10.00 percent reporting that number of new and/or expanding DOOH networks was slightly lower.

The Near-Term DS Index estimate of new/expanding DOOH networks over the next three to six months shows an expected increase of 8.46 percent when compared to the third quarter 2009.



Chart 11: New/Expanding DOOH Networks



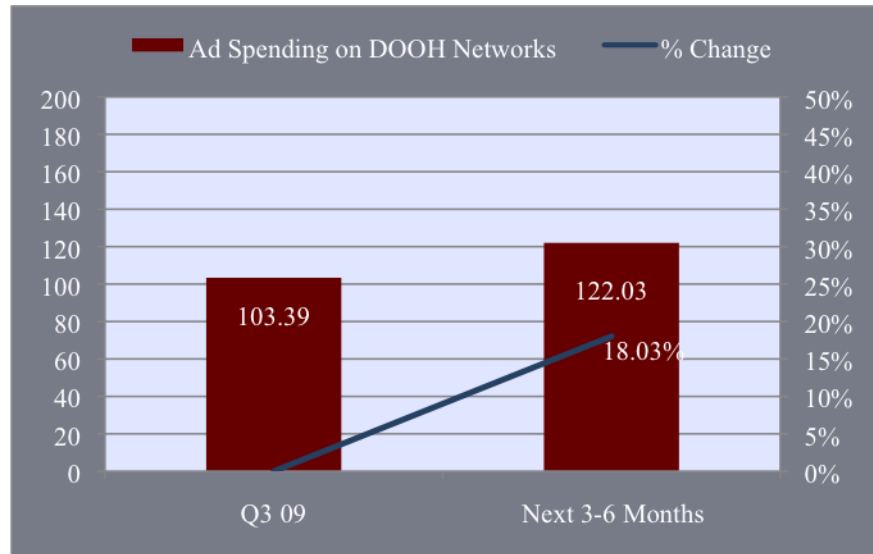
Ad Spending on DOOH Networks

The change in DOOH network ad spending for the third quarter is 3.39 percent above the second quarter 2009. To offer another perspective on ad spending on DOOH networks for the third versus second quarter 2009, PRI also presents here the survey question responses, which found 31.70 percent of respondents reporting that ad spending on DOOH networks in the third quarter 2009 was about the same as during the second quarter; 21.70 percent reporting that ad spending on DOOH networks was slightly higher; and, 6.70 percent reporting that ad spending on DOOH networks was much lower.

The Near-Term DS Index estimate for the change in ad spending over the next three to six months shows an expected increase of 18.03 percent when compared to the third quarter 2009. This may be compared with PQ Media’s estimate that for 2004 to 2009, U.S. DOOH spending grew at a 16.40 percent compound annual rate. However, as PQ Media includes in-movie and digital billboards, among other things, in its estimate (which are not considered here), PQ Media’s estimate is not directly equivalent, and their estimate is presented here solely for a comparison. For 2010-2014, PQ Media estimates that U.S. DOOH spending will grow at a 9.40 percent compound annual rate. BIA/Kelsey’s estimate for 2009-2013 is that U.S. DOOH spending will increase by a 13.50 percent compound annual growth rate.



Chart 12: Ad Spending on DOOH Networks



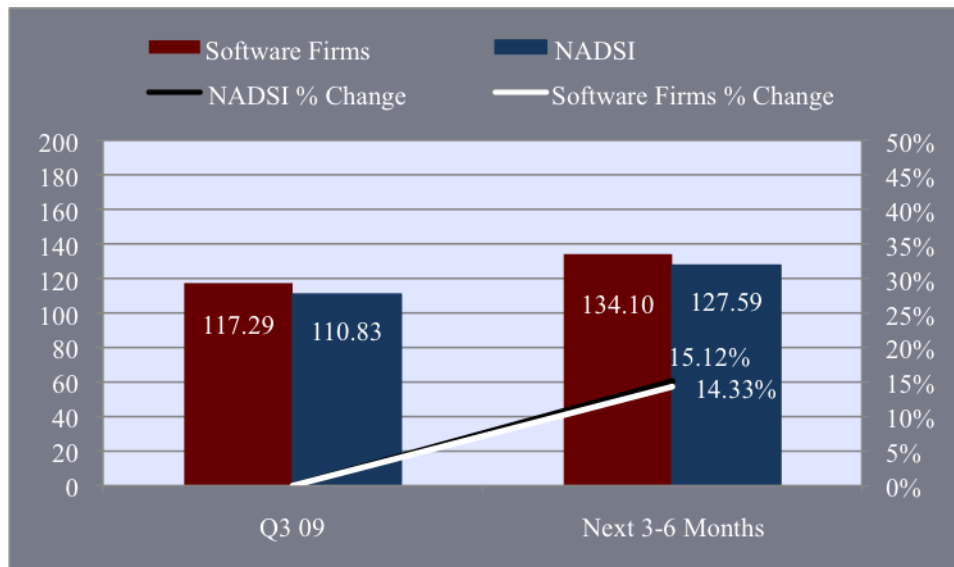
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Index Sub-Segment Performance

Software Firms

PRI defines software firms as those providing software and related services that support digital signage, signage networks, and/or content creation. For the third quarter 2009, these firms were 5.83 percent more optimistic about the current level of business/industry activity versus the industry average. Over the next three to six months, the software firm respondents' outlook for business activity is 14.33 percent higher than the current period, 5.10 percent lower than the industry average.

Chart 13: Software Firms



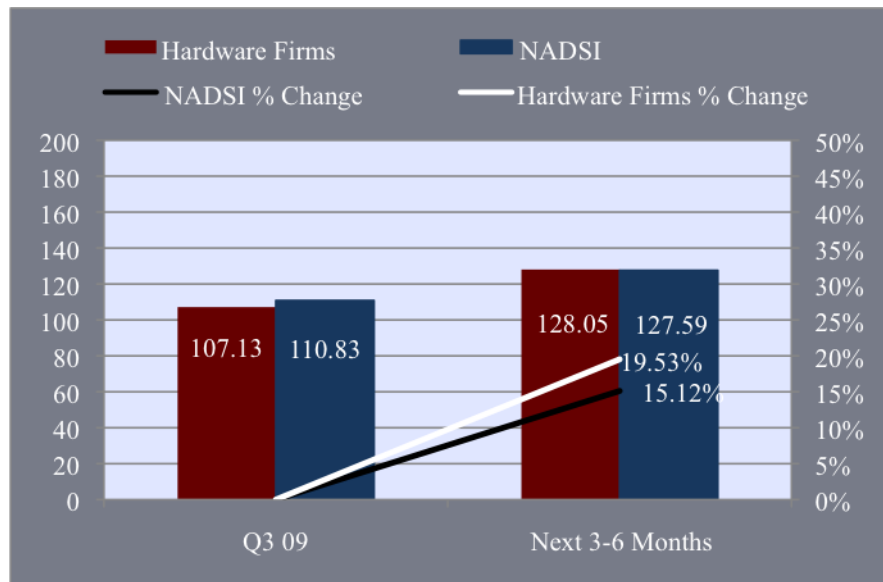
Hardware Firms

PRI defines hardware firms as those providing digital signage equipment including screens, projectors, players, mounts, wireless controllers, signal distribution, etc. For the third quarter 2009, these firms were 3.34 percent less optimistic about the current level of business/industry activity versus the industry average. Over the next three to six months, the hardware firm respondents' outlook for business activity is 19.53 percent higher than the current period, 0.36 percent more than the industry average.



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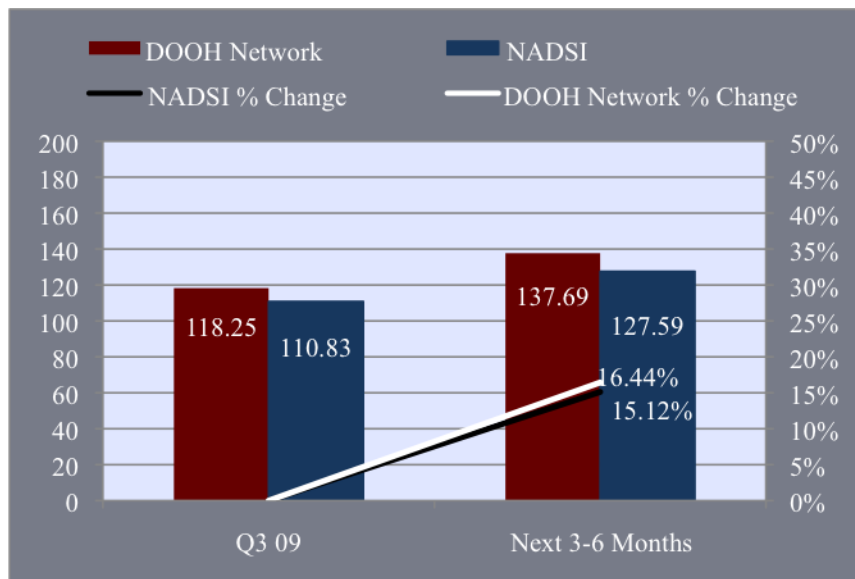
Chart 14: Hardware Firms



DOOH Networks

PRI defines DOOH networks as those owning, operating, or providing services for a digital signage network organized for the primary purpose of accepting third-party paid advertisements. For the third quarter 2009, these firms were 6.69 percent more optimistic about the current level of business/industry activity versus the industry average. Over the next three to six months, the DOOH network respondents' outlook for business activity is 16.44 percent higher than the current period, 7.92 percent more than the industry average.

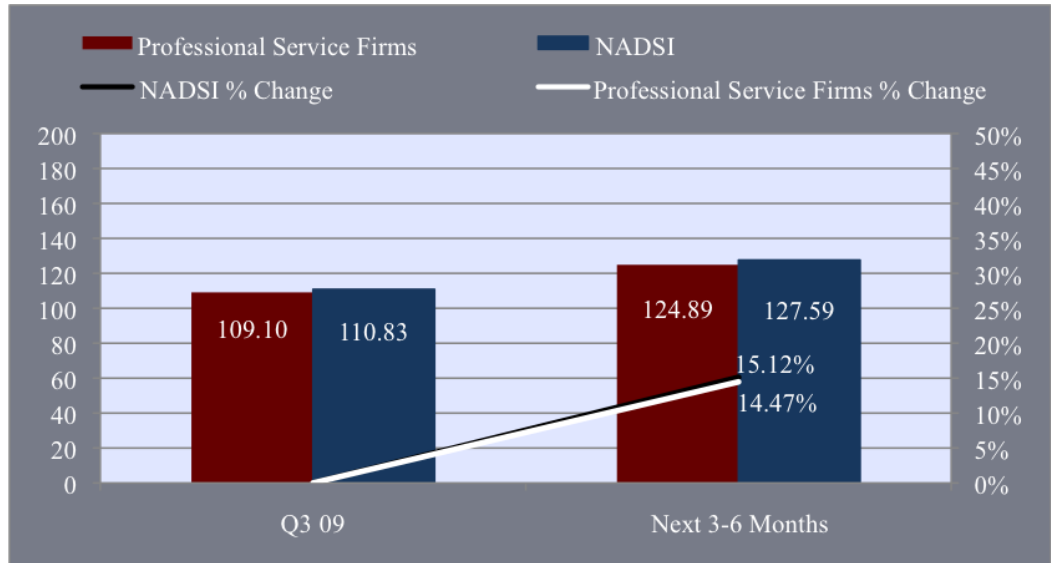
Chart 15: DOOH Networks



Professional Service Firms

PRI defines professional service firms as those providing services including or related to consulting, research, industry related publications and events, engineering services (such as design, layout, installation and maintenance), Pro AV, trade associations, etc. For the third quarter 2009, these firms were 1.56 percent less optimistic about the current level of business/industry activity versus the industry average. Over the next three to six months, the professional service firm respondents' outlook for business activity is 14.47 percent higher than current period, 2.12 percent lower than the industry average.

Chart 16: Professional Service Firms



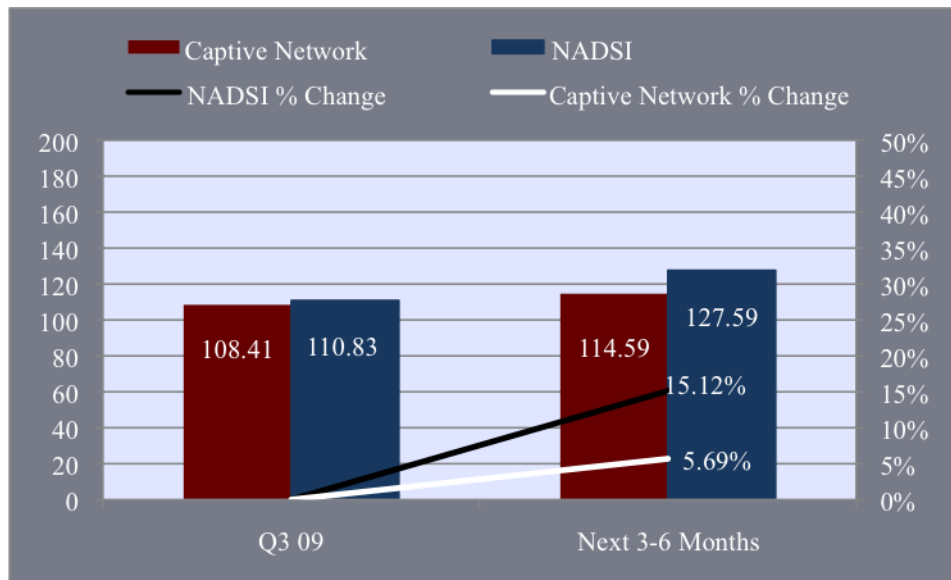
Captive Networks

PRI defines captive networks as those owning, operating, or providing services for a digital signage network organized for the primary purpose of promoting the host firm's merchandise, branding, or other related activities. For the third quarter 2009, these firms were 2.18 percent less optimistic about the current level of business/industry activity versus the industry average. Over the next three to six months, the captive network respondents' outlook for business activity is 5.69 percent higher than the current period, 10.19 percent lower than the industry average.



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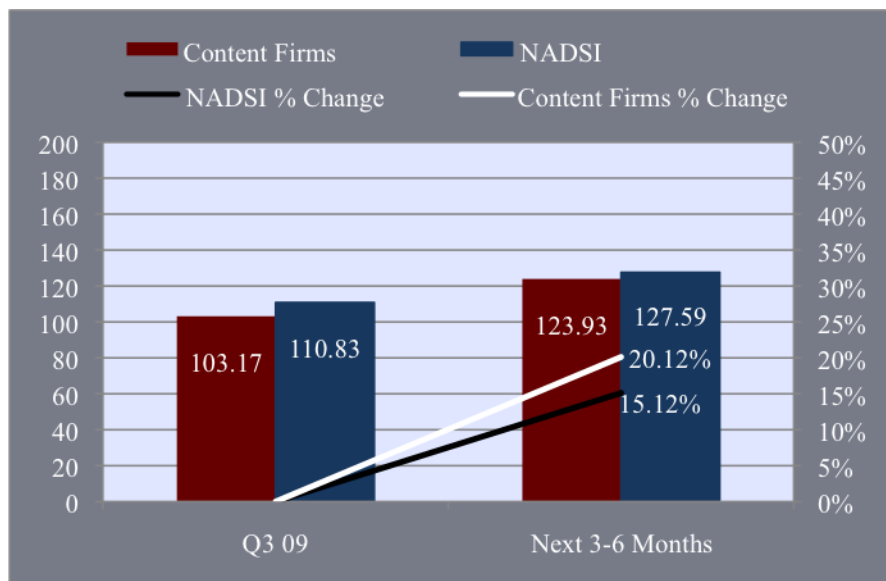
Chart 17: Captive Networks



Content Firms

PRI defines content firms as those that create digital signage content or provide related services. For the third quarter 2009, these firms were 6.91 percent less optimistic about the current level of business/industry activity versus the industry average. Over the next three to six months, the content firm respondents' outlook for business activity is 20.12 percent higher than the current period, 2.87 percent lower than the industry average.

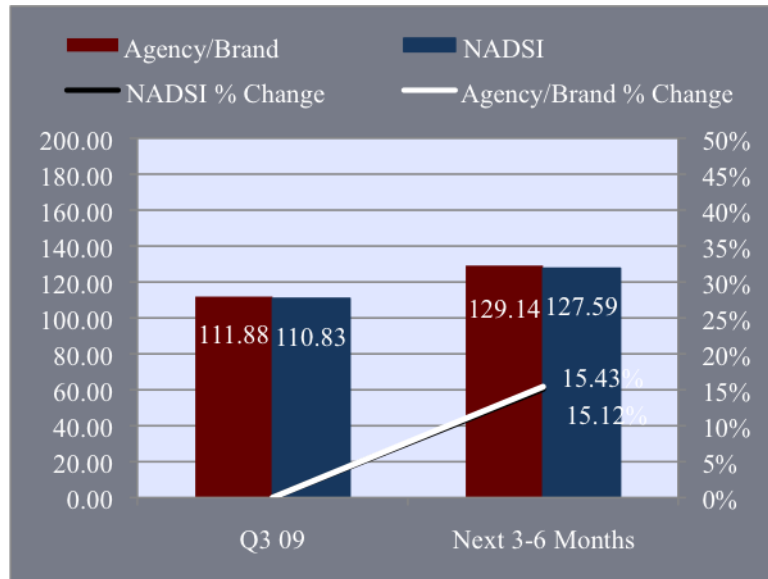
Chart 18: Content Firms



Agencies/Brands

PRI defines agencies/brands as firms that provide strategic planning, creative planning, content production, and/or media buying products/services related to DOOH advertising. For the third quarter 2009, these firms were 0.95 percent more optimistic about the current level of business/industry activity versus the industry average. Over the next three to six months, the agency/brand respondents' outlook for business activity is 15.43 percent higher than the current period, 1.21 percent more than the industry average.

Chart 19: Agencies/Brands



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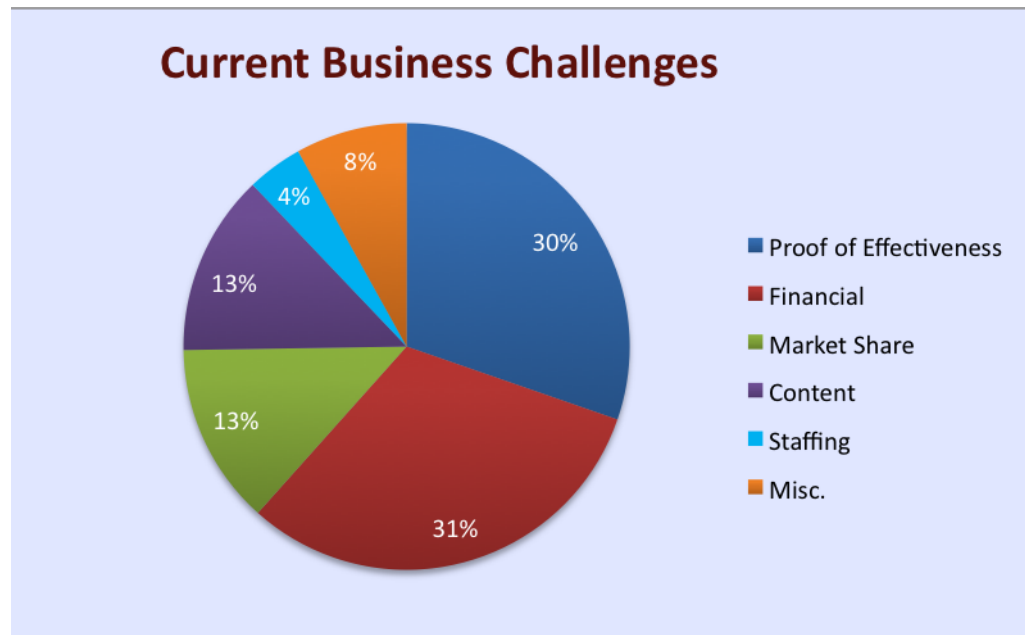
Challenges Confronting the Digital Signage Industry

A series of six subjective, open-ended questions were posed to the respondents. Their responses are summarized below:

1. What issues are facing your business today?

Financial issues were of primary concern. Weakness in the overall economy and a lack of available capital for investment, were often noted. Proof of effectiveness in the digital signage industry is also problematic. Proof of an ROI, as well as an acceptable set of metrics, were of primary concern.

Chart 20: Current Business Challenges



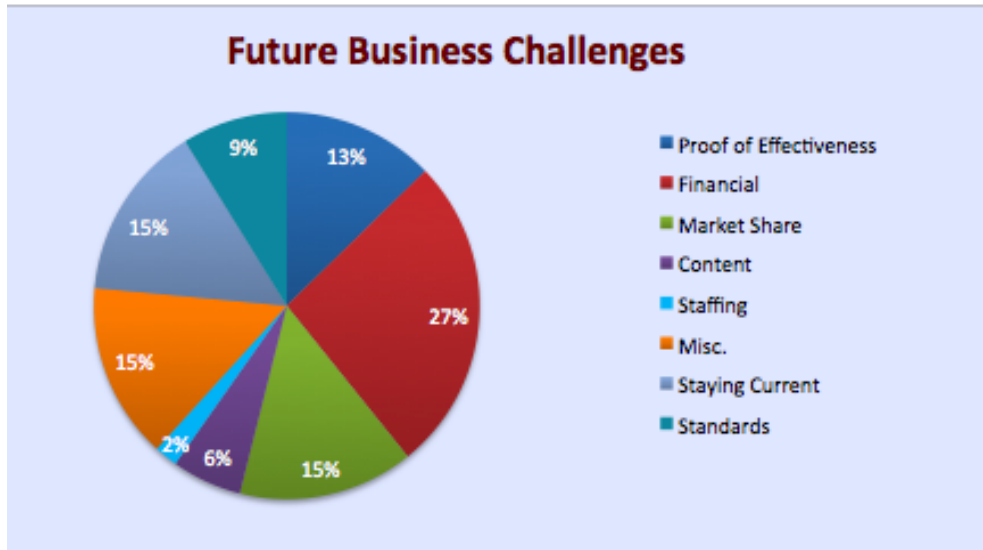
2. What challenges will your business face in the future?

Financial issues continued to be of primary concern in the future, but somewhat less so than as a current concern. This is consistent with the general overall outlook for an improving economy. Market share concerns, primarily revolving around competition and capturing a share of marketing budgets, were often cited. Staying current with technology, emerging business models, and industry trends were also noted. The significant decline in the concern over proof of effectiveness may indicate a sense that these issues will be adequately addressed in the future.



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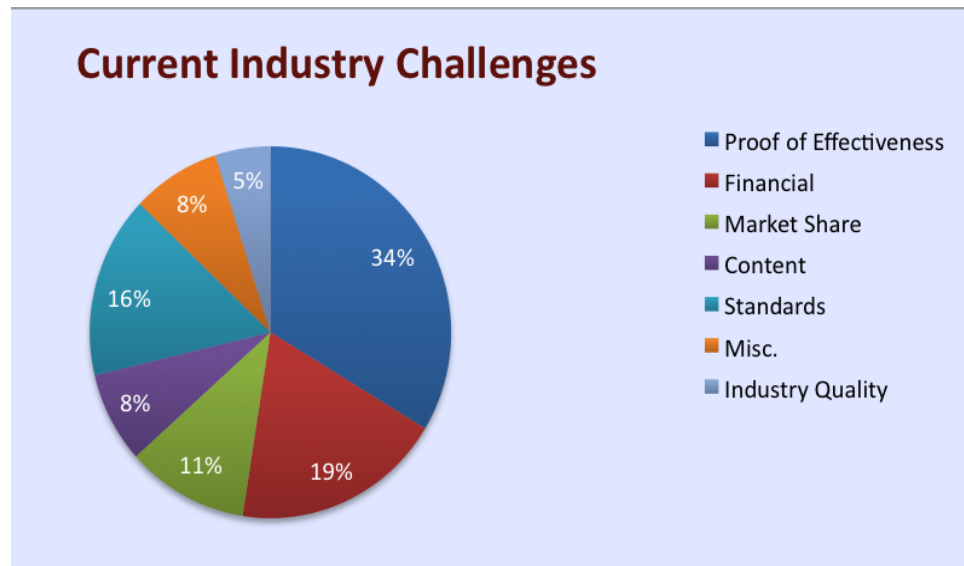
Chart 21: Future Business Challenges



3. What issues are facing the digital signage industry today?

Proof of effectiveness for the industry overall is of primary concern, as is acceptance of the medium by the advertising community. Financial concerns remain problematic, particularly as it relates to the heavy capital investments required to deploy a network. The need for industry standardization is also important, to ensure hardware, software, and network compatibility.

Chart 22: Current Industry Challenges



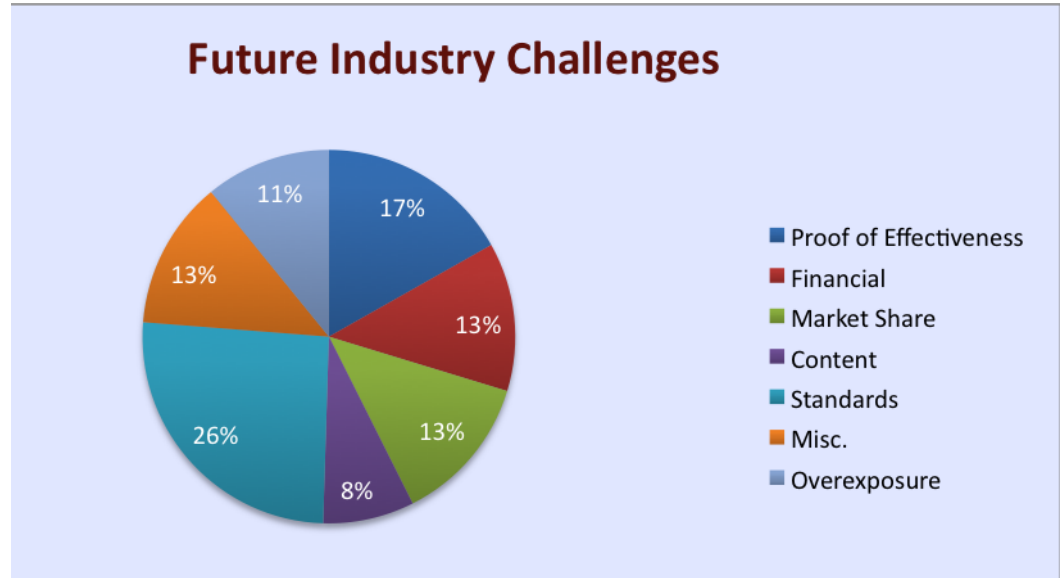
4. What challenges will the digital signage industry face in the future?

Industry standards are perceived to be of critical importance to the industry in the future, including managing content across multiple networks, the need for industry consolidation to improve operating efficiencies and scale, and the integration of mobile devices and the internet with digital signs, all of which are deemed significant. The prospect of industry overexposure was raised, which refers to digital



signage advertising being placed “frivolously,” with the consequence of lowering overall industry quality and the strategy in support of such advertising.

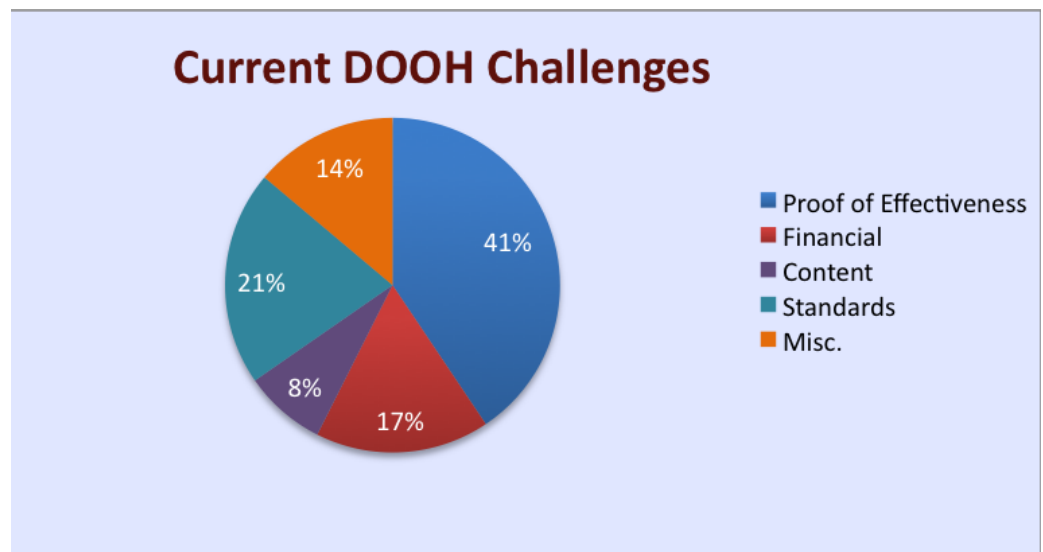
Chart 23: Future Industry Challenges



5. What issues are DOOH, ad-supported networks facing today?

Proof of effectiveness is cited as the number one issue faced by DOOH networks today. Awareness, education, medium acceptance, a lack of metrics that provide for continuous feedback, a lack of network reach, and competition for ad dollars are often-noted problems. Standards relating to the difficulty associated with planning, buying and scheduling are also noted concerns.

Chart 24: Current DOOH Challenges

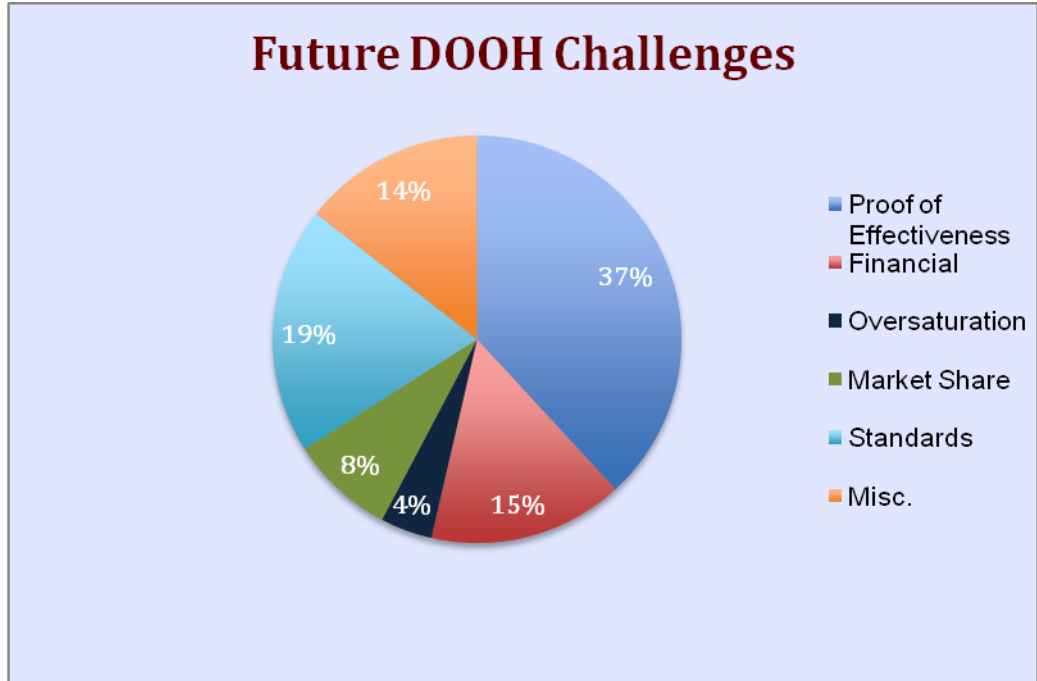


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6. What challenges will the DOOH, ad-supported networks face in the future?

Effectiveness and standards are also viewed as long-term industry challenges. Also raised is the dilemma associated with advertisers' failure to embrace the unique attributes of the medium.

Chart 25: Future DOOH Challenges

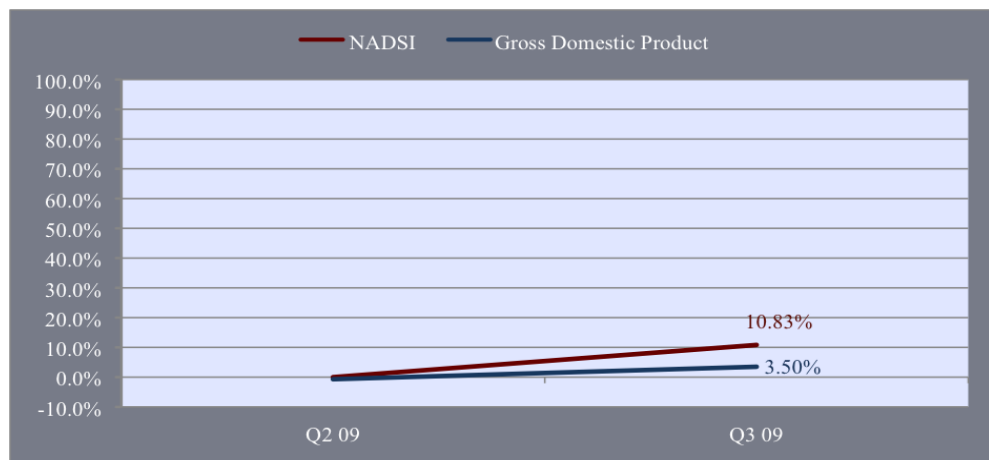


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Industry Economic Performance

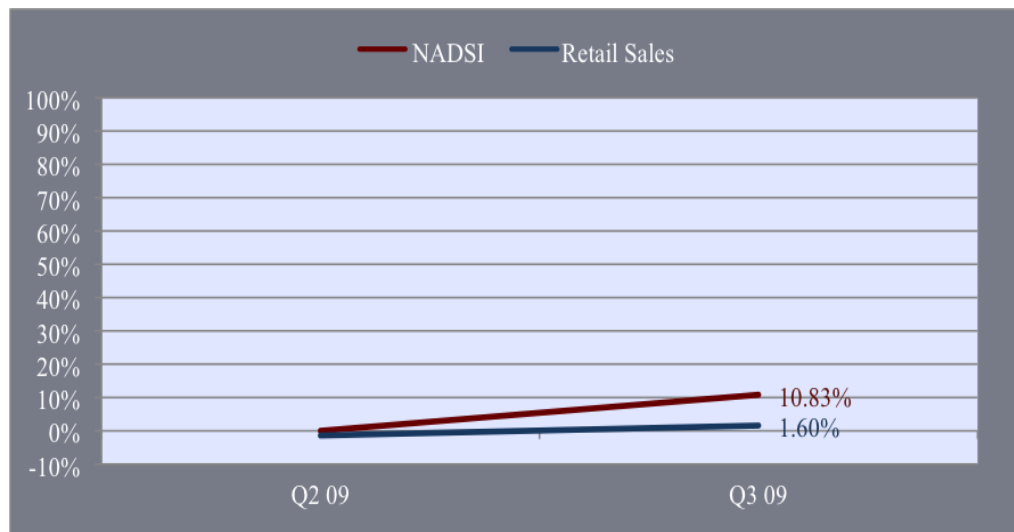
The Current DS Index rose by 10.83 percent in the third quarter 2009 compared to the second quarter. This substantially outpaced growth in third quarter real GDP (inflation-adjusted), which grew by 3.50 percent (chart 26); retail sales, which rose in the third quarter by 1.60 percent (chart 27); total advertising industry revenue, which is projected to decline by 14.50 percent for the full year (chart 28); Internet advertising spending, which declined by 5.40 percent in the first half of 2009 compared with the first half of 2008 (chart 29); and Out-of-Home industry advertising revenue, which declined by 18.00 percent in the second quarter 2009 versus the second quarter 2008 (chart 30).

Chart 26: NADSI versus GDP



Source: Bureau of Economic Analysis

Chart 27: NADSI versus Retail Sales

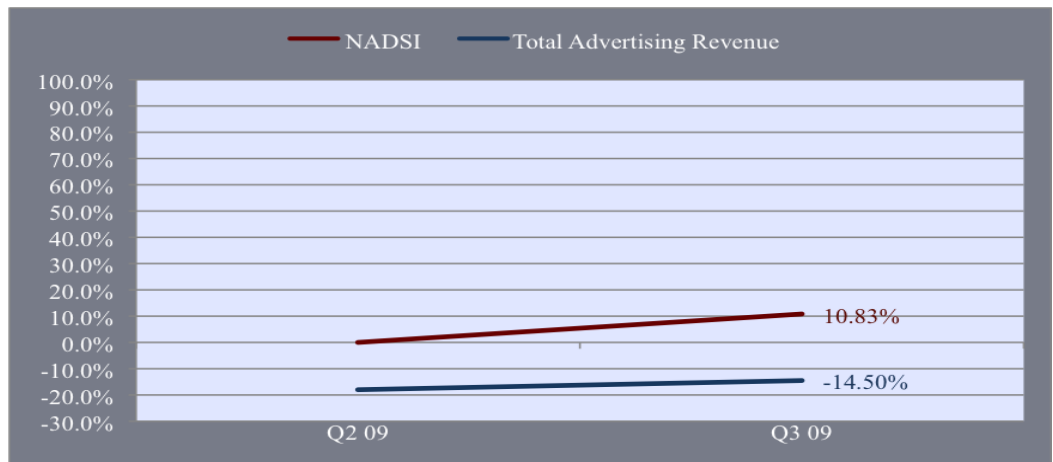


Source: Northern Trust Global Economic Research



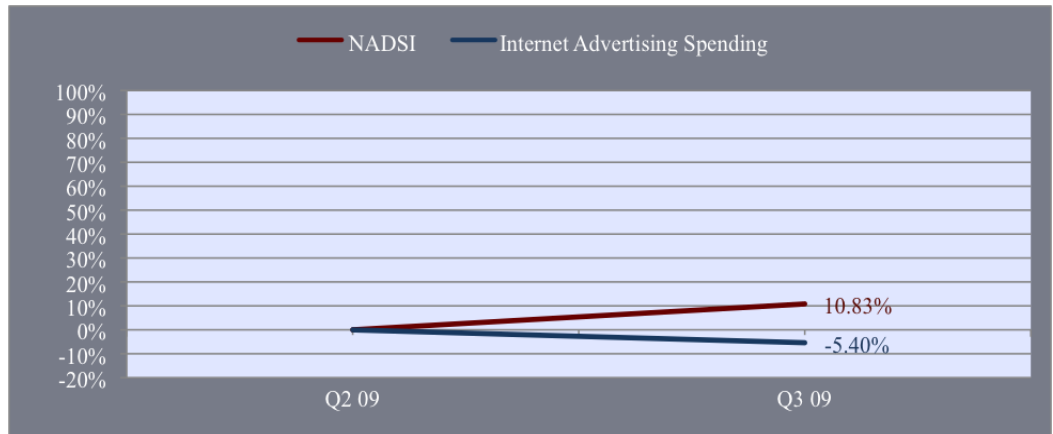
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Chart 28: NADSI versus Total Advertising Revenue



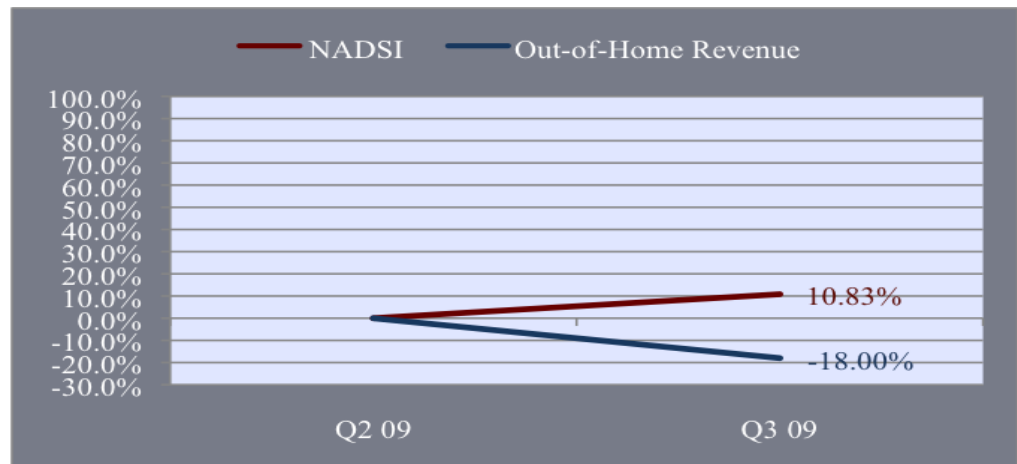
Source: Magna, an Interpublic Group company. Magna estimated second-quarter ad revenue fell 18.00 percent, and projected revenue will fall 14.50 percent for the year.

Chart 29: NADSI versus Internet Advertising Spending



Source: Interactive Advertising Bureau. Comparing the change from the first half of 2008 to the first half of 2009. (Third quarter results were not available as of this Report release date.)

Chart 30: NADSI versus Out-of-Home Internet Advertising Spending



Source: TNS Media Intelligence/CMR OAAA (September 2009). Comparing the change from the second quarter 2009 to the second quarter 2009. (Third quarter results were not available as of this Report release date.)



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Participating Firms

In compiling its research, PRI invited established, industry-leading firms to participate. This ensures that the results are reflective of the opinions of a broad cross section of knowledgeable and established individuals. PRI would like to acknowledge the participation of the following firms:

Adcentricity	LG
Adspace Digital Mall Network	Magnetic 3D
AgencyTWO25	McDonnell Haynes
Anheuser-Busch	MET HODDER
Arc Worldwide	Moxie Interactive
AutoNetTV	Nanonation
Beacon's Light	NEC
Best Buy	Neo Advertising
Black Box Network Services	Peerless
Broadsign	Pro-Motion Technology Group
Capture	Reflect Systems
CBS Outernet	Rogers Communications
Channelport TV	Ryan Partnership
Cisco	Santa Clara University
DecisionPoint	Scala
DisplaySearch	SeeSaw Networks
DigiKomp	Selling Machine Partners
Digital Signage Universe	SportScape
Electronic Art	Starcom
Fowler Creative Media	Starmont
GSP	St. Joseph Content
Harris Bank	Stratacache
IBM	Symon Communications
In-Store Broadcasting Network	TPN
IPG Emerging Media Labs	TracyLocke
JCPenney	Wells Fargo
jSAT	X2O Media
KeyWest Technology	

Bold indicates PRI Member Firms

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