



imagine the future of UK retail

UK Retail Digital Signage Survey

An essential reference point for any retailer, brand, or manufacturer, using (or considering) in-store digital signage

Sixth edition: August 2007

Independent Research Document conducted and produced by Realisation Marketing Services Limited 2007



Frequently Asked Questions

What is the Samsung UK digital signage survey?

The 'Samsung UK Digital Signage Survey' is widely regarded as the most comprehensive and accurate measure of screen usage within the UK retail sector. It offers a 'snapshot' of how, when, where, and why screens are being used by retailers. The survey is conducted twice annually, and a summary of the results published in both paper and electronic formats. This (the sixth edition) includes a special feature on screen usage in UK shopping centres.

What are the objectives of the survey?

1. To establish the number of screens in operation within UK retailers.
2. To identify why, where, when, and how retailers are using use screens.
3. To ascertain how many systems are interactive.
4. To investigate the use of audio with screens.
5. To understand content update frequency and method.
6. To examine the primary funding methods for networks and screens.
7. To offer some predictions on the future use of screens.

Who is the survey aimed at?

The survey is aimed at key decision makers within UK retail sector, primarily those involved with in-store communication and marketing. It is especially useful to individuals using or considering using screens to promote their products or services. The primary audience will have an interest in; Store Design, Store Marketing, Customer Communications, or Retail Operations. The report will also benefit those working for Manufacturers or Suppliers of UK retailers. Typically this will involve those responsible for POS or Merchandising. This might include; Brand Managers, Trade Marketing Managers, and Marketing Directors. Finally, the report will be of interest to anyone seeking to understand how UK retailers are using screens to complement (or as an alternative to) conventional POS.

How can I participate?

The survey is usually conducted by telephone (using a database of retail contacts) and usually takes no more than a couple of minutes to complete. An 'on-line' version of the questionnaire can also be viewed at:

<https://secure.formassembly.com/forms/21203>.

The next phase of research is due to take place in November 2007.

Why should I participate?

The survey can only be conducted with the cooperation of major UK retailers and brand owners. The more responses we receive the more accurate the overall picture will be. All participants are entitled to a free copy of the report (valued at £295 + VAT) which will be e-mailed to them upon publication. As a personal incentive, all recipients will also be entered into a draw to win a 32" Samsung flat screen TV.

How can I obtain further copies of the report?

The summary report is made available free of charge to; survey participants, members of 'The Screen', and clients of Samsung and Realisation. Non members/participants can purchase additional copies at the full retail price of £295 + VAT (see contact details on the reverse of the survey).

Who compiles the survey?

The survey is compiled by Realisation Marketing Services Ltd. on behalf of Samsung Electronics UK Ltd. in association with 'The Screen' (see 'About the sponsors' on page 15 for more information).

Is my data safe?

Absolutely. No retailers, companies, or individuals are quoted by name, and no confidential data is published or passed on to any third parties. A full copy of our privacy policy can be viewed at: <https://secure.formassembly.com/forms/21203>

What is the history of the survey?

The survey was first conducted in November 2004. At the time, the scale of screen usage was unclear (industry estimates placed the total number at 11,000). The survey identified an actual figure of 57,739 screens across 11,384 retail locations. The survey has since become increasingly detailed with each installment. It now includes data on screen usage (broken down by retail sector), a measure of interactivity, screen types, funding sources, content delivery, retailer attitude, and future plans for the technology. With each additional phase of the survey, contributing parties are becoming more familiar with its value, and are increasingly requesting copies for internal use. This demonstrates Samsung's commitment to supporting and promoting the growth (and understanding) of this rapidly emerging medium.

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Management Summary

Overview

- The survey (now in its sixth edition) polls a wide spectrum of retailers (including those that do not currently use screens).
- This edition includes a special feature on UK shopping centres.

Screen usage

- 93 networks currently in operation.
- 14,475 outlets using screens.
- Approximately 102,582 screens in situ.
- The average no. of screens per outlet is 3 (excluding electrical retailers) or 7 (including electrical retailers).
- The no. of networks (and screens) is growing, and this growth is expected to continue.
- There were an additional 5253 screens identified since the last survey in September 2006 (an increase of 5.3%).

Hardware

- 42" is now the predominant size of screen in situ.
- LCD/TFT/Plasma are now the most commonly used screens, replacing CRT (TV) screens.
- Approximately half of all screens operate mute (without sound).
- The number of interactive screens is has decreased as a proportion, but is thought to be increasing overall.

Content

- 63% of retail screens are used for retailer branding, and 24% for supplier branding.
- Larger networks are more likely to be funded by suppliers or through media revenue generation.
- A number of smaller networks are self-funded by retailers.

Attitudes

- Many of the retailers currently using screens are extending their networks (and are installing more screens).
- Many of the retailers not currently using screens are 'considering using them' in the future.

Scope

New shopping mall survey for phase 6

There are over 200 shopping malls in the UK, and many are now using screens to communicate to their customers. Phase 6 of the survey attempts to record the usage of digital signage in shopping malls and centres (which were not covered in previous editions).

Qualification criteria

The survey monitors screen usage within the UK retail sector (which in this instance includes the afore mentioned shopping malls). In order to be included in the results, all of the following qualification criteria must be fulfilled. These criteria have been changed from previous phases of the survey (please see 'Methodology' and 'Analysis' sections for more information).

1. *The mall, store, branch, or outlet must be located within the UK*
2. *The primary application for the screens is the promotion of products and/or services.*
3. *Screens are customer facing and positioned inside the mall or store (ideally within 10m of the promoted product).*
4. *The screens are installed on a permanent basis (generally a minimum of 1 year).*

Definitions

By 'digital signage' we are referring to a 'display screen'. A 'screen' can be defined as any surface used to display a sequence of still or moving electronically generated images. This includes traditional (CRT) TV's and monitors, Plasma screens, TFT screens, LCD screens, LED (Light Emitting Diode) displays, and projection systems. A 'screen' may also have added interactivity such as 'touch sensitivity' or 'button driven' content. The 'UK retail sector' is defined as any outlet or business selling goods, merchandise, or services directly to the public for personal or domestic use, from premises within the United Kingdom. A 'shopping mall' is defined as a location (usually under cover) comprising multiple retail outlets, where the primary function of the visitor is to perform a multi-stop shopping trip (we may also refer to these as shopping centres or complexes).

Areas not covered.

A number of screens are not incorporated within the survey. Examples would include; screens used within a 'trade only' environment, 'information only' systems, or screens used primarily for entertainment. Generally speaking, if the screen message is not intended to initiate a sale of a product or service, then it will not be included in the survey (see examples listed below). This area is however, currently the subject of some debate amongst network operators. As such, the scope of future surveys may be extended to cover some of these applications.

Aeroplanes (individual passenger screens)
Arcade games
Airports
ATMs (indoor or outdoor)
Bookmakers (race odds and timetables)
Buses (advertising)
Bus stops
Casinos (gambling machines)
Juke boxes
Lifts/elevators
Outdoor signage (electronic billboards)
Outdoor retail parks
Shelf edge labels (monochrome EPOS price systems)
Public information systems (departure and arrival times)
Taxis
Ticket machines (e.g. car parks)
Trade only 'Cash & Carry'
Trains
Vending machines
Wholesalers

Methodology

Overview

Data for phase six of the survey was captured between 21st February and 14th March 2006. Four key methods were used-

1. Telephone survey.
2. Website survey.
3. Field visits.
4. Trade press articles.

Telephone survey

Where screens are currently used in-store, the person responsible for these was contacted directly. Where screen use was undetermined, the most likely key decision makers were interviewed. The job title of those spoken to included; Marketing Director, Marketing Manager, Communications Manager, Store Designer, and Brand Manager. A structured questionnaire was prepared and administered, and the results calculated.

Website survey

A website questionnaire was introduced for phase five of the research, and this has been re-implemented in phase 6. The web survey is structured identically to the telephone version (asking the same questions, and offering the same choice of answers). The aim of the web survey is to capture data from those companies reluctant to share information over the phone. It also suits respondents for whom a telephone survey was inconvenient, and those simply looking to view a list of questions prior to making a response. The survey features a detailed privacy policy to alleviate concerns regarding data usage. This reassures participants that sensitive information (such as company name) remains confidential. You can view a copy of the web survey and the privacy policy at: <https://secure.formassembly.com/forms/21203>

Field visits

Two city centres were visited during March July 2007; London, and Kingston Upon Thames. In both instances, a tour of the key city centre shopping areas (including malls) was conducted. Where screens were present numbers and type were noted. Focus was placed upon multiple retailers. The field visits cannot capture the same data as the telephone and website surveys however, and this has been taken into account when presenting the results.

Trade press articles

A number of trade press magazines were monitored over January, February, and March 2007. Where screen numbers and types were mentioned, this data was recorded (the survey assumes that article information is generally accurate, however if there are any inaccuracies, then these will be reflected in the survey).

Considerations

It is impossible to monitor every single screen in every UK retail outlet, and the survey results are likely to be lower than the actual number of screens in situ. The survey does however offer a useful 'snapshot' and an indication of how screen usage (and attitudes to screen usage) are changing. When viewing the data, the reader is asked to bear in mind a number of considerations:-

The primary source of information is the telephone survey. It is impractical to interview all UK retailers (especially smaller independents), so a selection of key 'high street names' was targeted. In the future, stricter qualification criteria will be implemented

The survey adheres to the 1998 Data Protection Act and data usage is subject to a strict privacy policy. The majority of network owners were happy to contribute fully to the survey given the guarantee of anonymity. A small number of respondents were unable or unwilling to participate in the survey (primarily due to company policy). In these instances no data was recorded. A number of participants were unwilling or unable to answer all questions posed. Where questions were not answered, this was taken into account when calculating response totals.

The survey has been successful in contacting the vast majority of previous retailers who were recorded as having a screen network in situ in phase 5. Where a retailer has been unable to participate, their screen data from phase 5 has been incorporated into the results for phase 6. No attitudinal data has been carried forward. Thus if 'XYZ PLC' had 50 screens in phase 5 (but we were unable to contact them in phase 6) the assumption is that these screens are still in situ. Whilst not being completely robust, this is assumed to be fair given the permanent nature of the medium, and the long term strategy required when implementing it. Many retailers are still assessing the impact of screen communication (once in situ, few are removed). Where possible, if a participant was not contacted, their previous answers were checked during the field visits or from trade press articles.

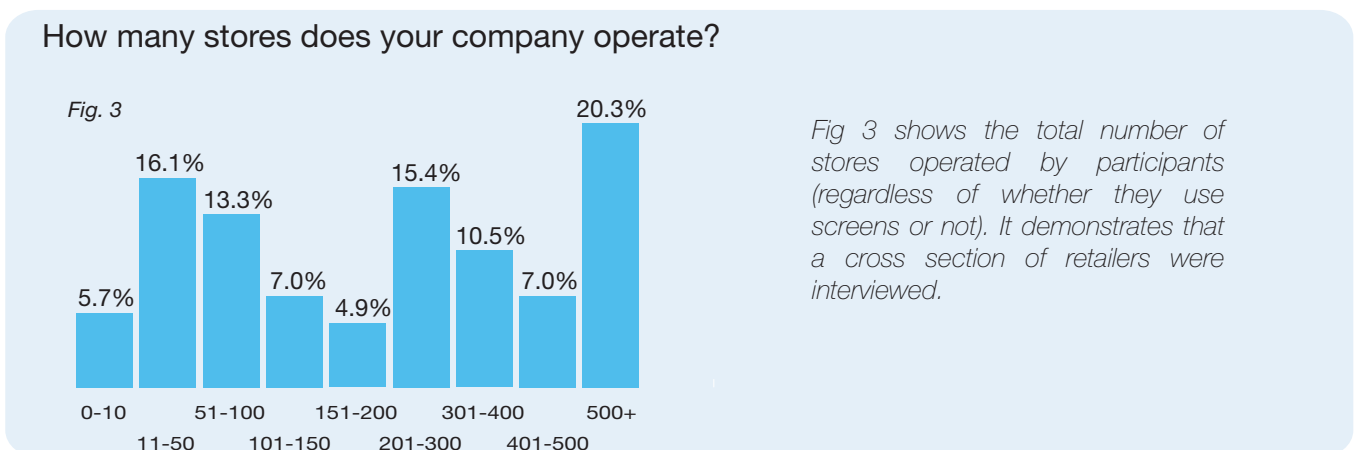
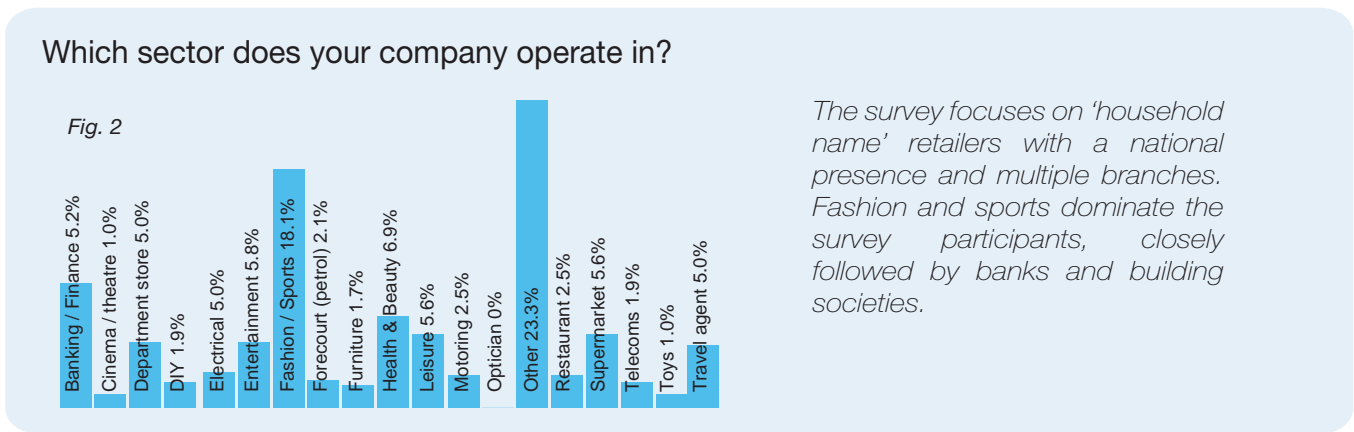
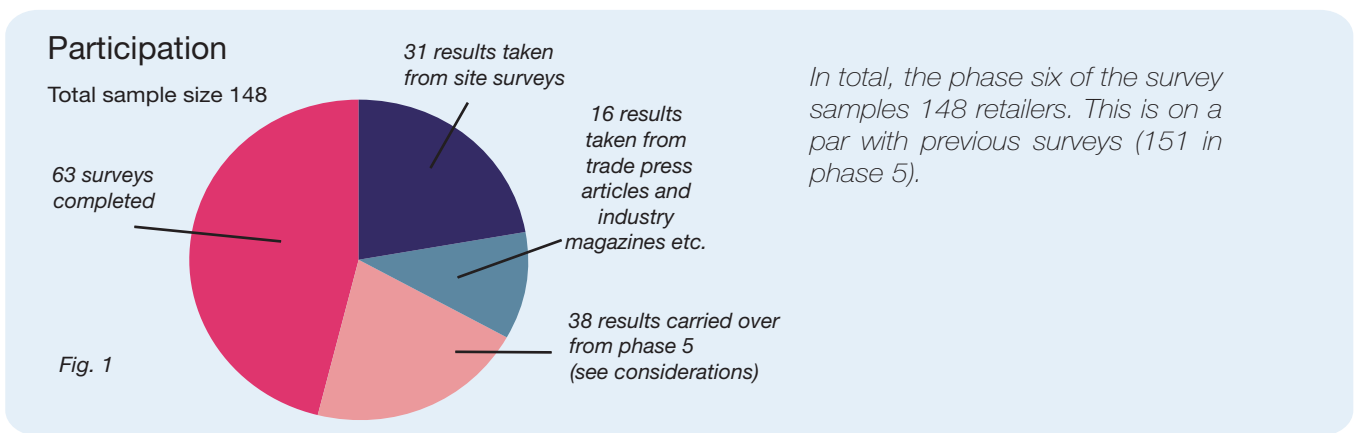
Considerations (continued)

The number of screens located within electrical retailers could influence the survey results significantly (resulting in a misleading picture). For example, a display of TVs within an electrical store would generally not be included. If the screens were running advertisements for specific offers within the store however, there is an argument to suggest that these figures should be included (because they fit the previously outlined qualification criteria). To address this issue, these screens have been included in the survey, but the figures have been isolated where they are deemed to skew the results. This is clearly noted where applicable.

The aim of the survey is to offer a representative sample of the use of screens within the UK retail sector. As such, it does not focus solely on 'Samsung' products, and includes data (such as number of screens) from all screen manufacturers. To offer impartiality, the survey is conducted and produced independently and not by Samsung Electronics UK Ltd.

Analysis

Phase four (the previous edition) of the survey only incorporated companies that were known to have screen networks in place. Whilst the survey still focuses on these operators, phase six incorporates a wider cross selection of key UK retailers (irrespective of whether they are known to have networks or not). This is an attempt to predict forward trends, and understand current attitudes towards screen usage.



Do you currently use screens to communicate to your customers in-store?

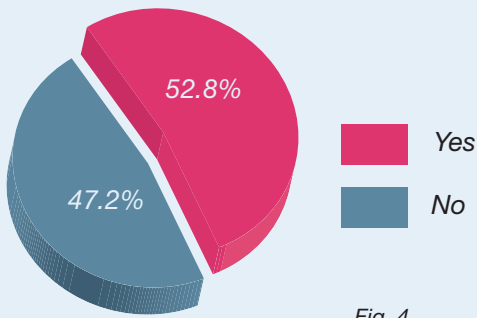


Fig. 4

Of those surveyed, 52.8% currently use screens in store. NB. This is not representative of all retailers, and is due to the fact that historically the survey only contacted retailers known to be using screen networks.

How many of your stores operate screens?

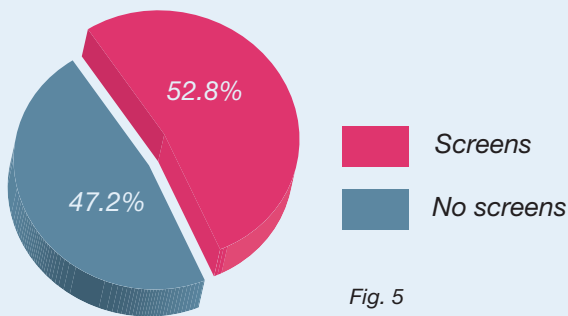


Fig. 5

Fig 5 applies to those retailers using screens, and represents the number of stores with screens in situ as a % of total stores. Where screens are used by a retailer, they are sited in approximately half of their stores.

No. screens per store

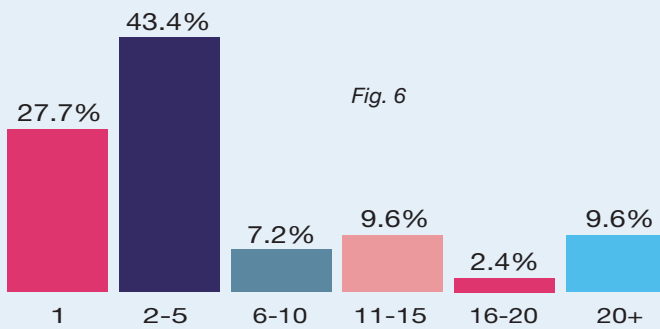


Fig. 6

Most stores operate between 1 and 5 screens. Those operating more than 10 screens tend to have a much larger floor space (such as supermarkets).

Screen penetration by sector

Fig. 7

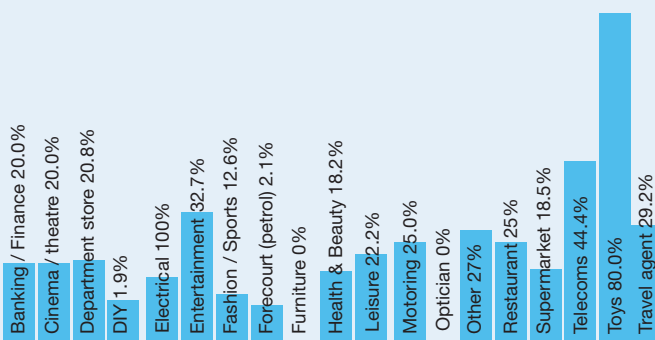


Fig 7 shows the number of outlets using screens (as a percentage of total outlets in that sector).

102,582 screens in total

When were the screens first installed?

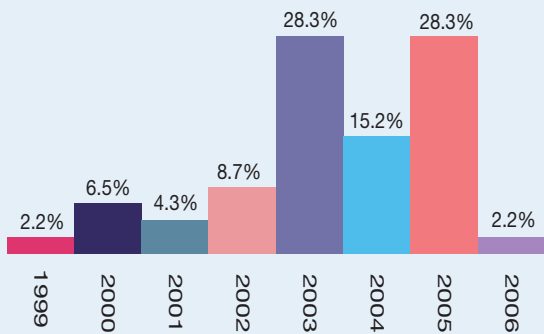


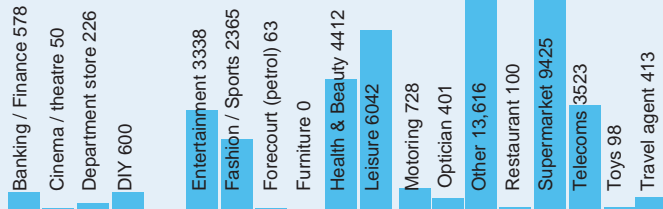
Fig. 8

It would appear that the majority of retailers using screens have been doing so for 2-3 years (possibly due to the fall in the price of TFT/LCD screens during this time). Interestingly, not many screens were installed during 2006.

No. screens by sector (excluding electrical retailers)

45,978 screens in total

Fig. 9



Supermarkets, leisure & entertainment outlets, and telecoms stores continue to have the highest total numbers of screens overall. Many of these stores have multiple screens.

Screen penetration

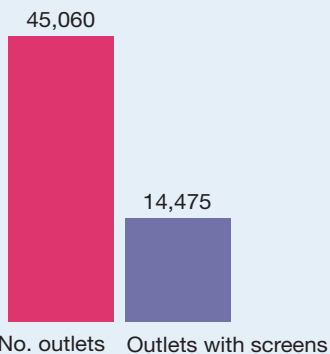


Fig. 10

Fig 10 shows the penetration of screens within the retail sector as proportion of participants. It is not representative of the retail sector as a whole.

What type of screen do you use?

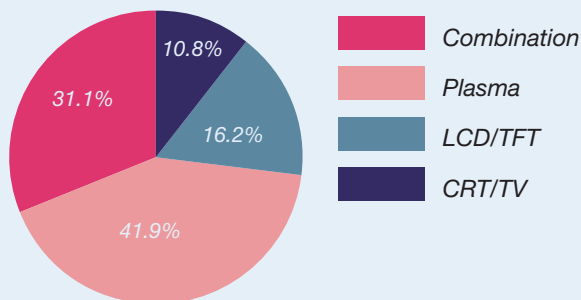


Fig. 11

Plasma screens are currently the most popular option amongst retailers. A number of retailers use a 'mixture' of screen types. Several retailers stated that they were in the process of upgrading TV/CRT style screens to LCD/TFT or plasma.

What size of screens do you use?

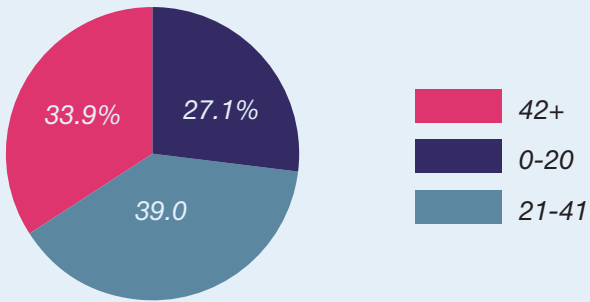


Fig. 12

The price of screens has generally fallen over the last 2-3 years, and this may explain a move to 42" screens by several retailers. A number of 7" 'shelf edge' screens have been introduced within the last 18 months.

How is the content delivered to screen?

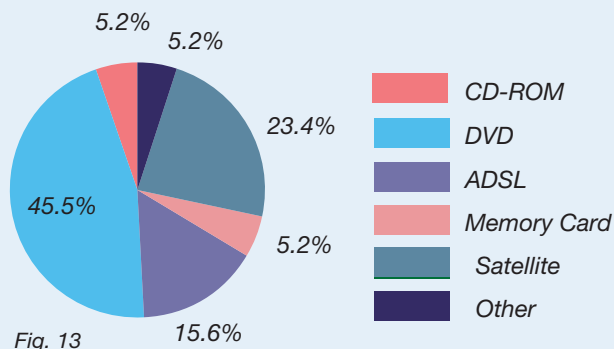


Fig. 13

The most popular method of content distribution is DVD, although many of the larger retailers use satellite. The use of new technology (such as 'solid state' PC based systems) is expected to grow.

Do the screens use sound or audio?

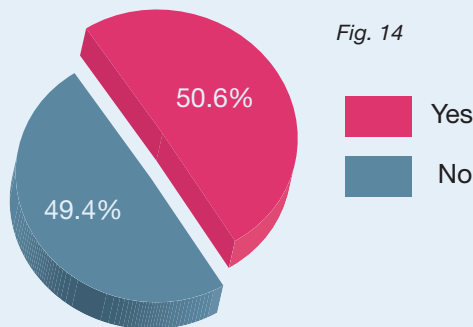


Fig. 14

Approximately half of all networks use sound. In some instances, the network might run in conjunction with an 'in-store radio' system.

How many channels do you operate?

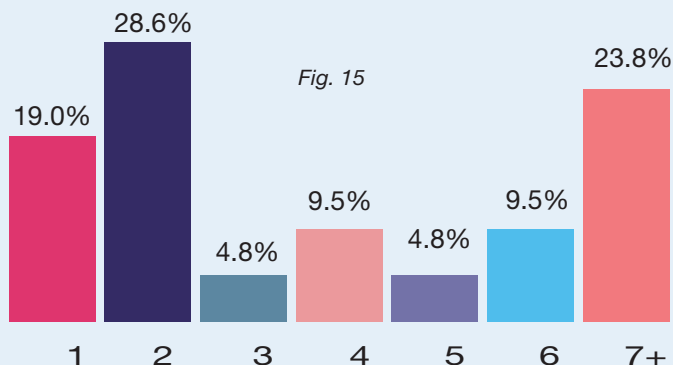
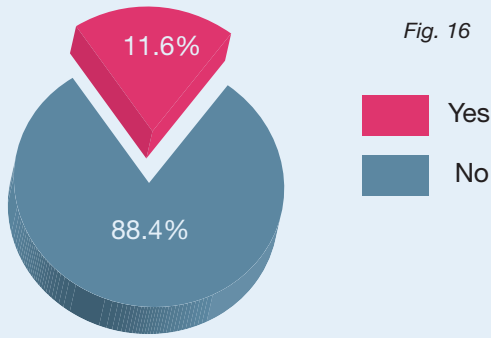


Fig. 15

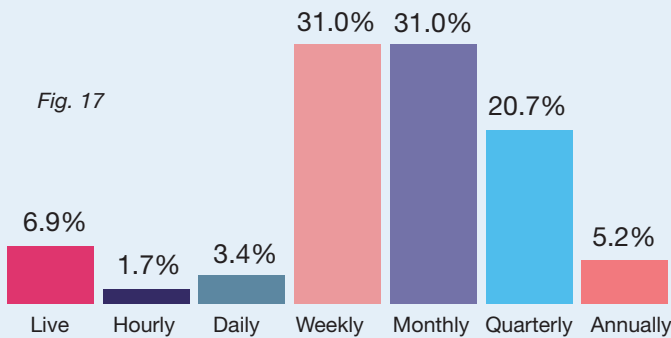
The majority of retailers surveyed operate 1-2 channels (where the same content appears on every screen). Supermarkets and Department stores tend to use a greater number of channels due to the diversity of products on offer.

Are the screens interactive?



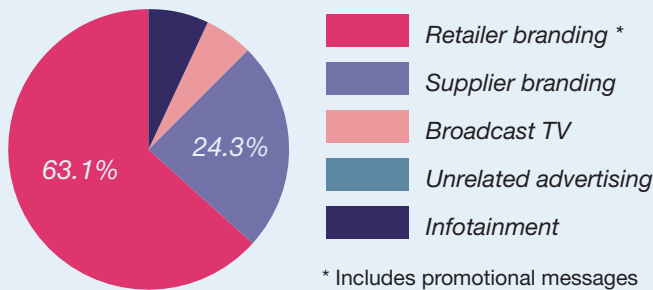
Approximately 1 in 10 screens are interactive. This area is expected to see further growth, and future surveys may examine the subject of interactivity in more detail.

How often do you update your screen content?



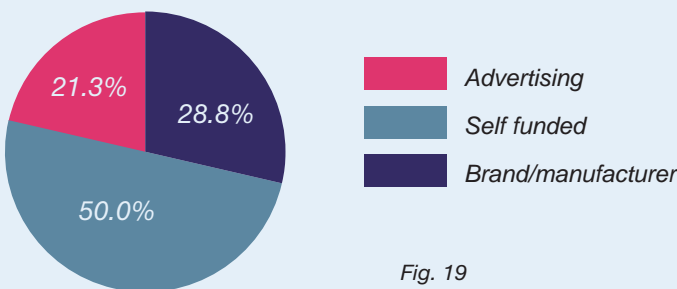
Most content is updated weekly or monthly. This applies particularly to mobile phone and electrical retailers (who tend to change their promotional offers on a frequent basis). Retailers selling seasonal goods have less requirement for regular content updates.

How would you classify the content shown on screen?



Most retailers see screens as a tool to communicate promotional messages and retailer branding.

What is the main source of funding for your network?



A significant proportion of screen networks are funded by brands. In some instances these will form part of a branded display.

What would you consider to be a reasonable investment on screens (per store)?

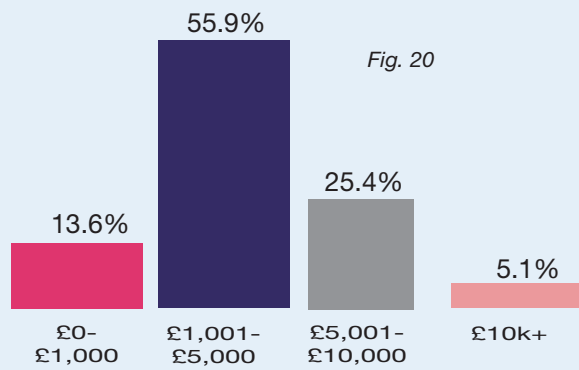


Fig. 20

Most retailers think that £1-£5k would be a reasonable investment per store. This will of course be highly influenced by the size and type of store, especially retail floor space. Generally those considering £10k+ to be a reasonable investment have much larger stores.

Perceived benefit of screens 'Sales uplift'

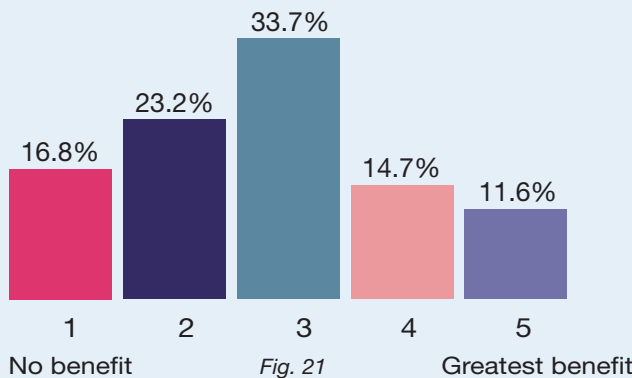


Fig. 21

Retailers consider sales uplift to be an important benefit of screen use. These figures (and those in the following charts) reflect all opinions (irrespective of whether the survey participant currently used screens).

Perceived benefit of screens 'Brand messages'

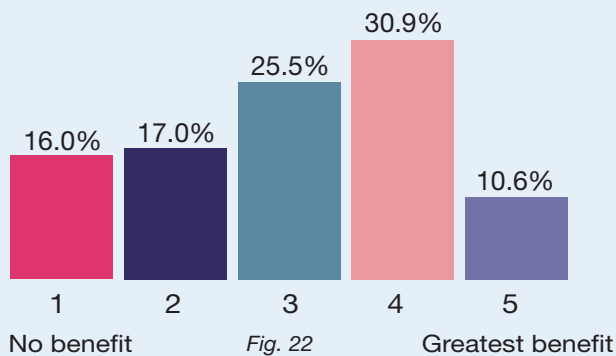


Fig. 22

Brand messaging seems to be a key reason for screen use. This ties in well with the classification of screen use. Brand messages would appear to be even more important than sales uplift.

Perceived benefit of screens 'Advertising revenue'

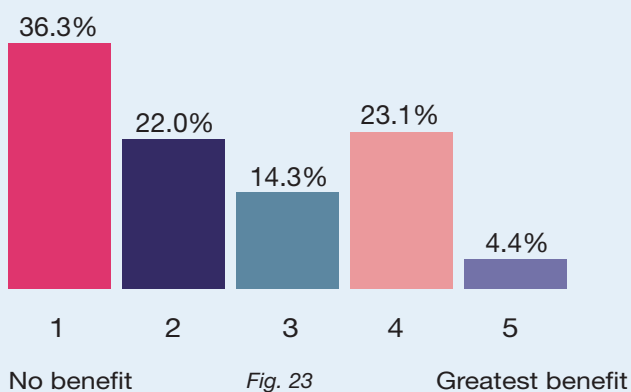
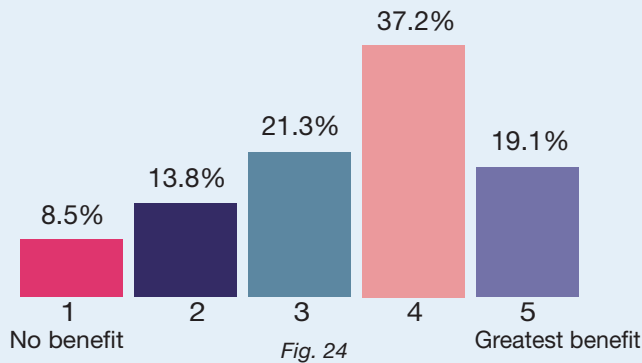


Fig. 23

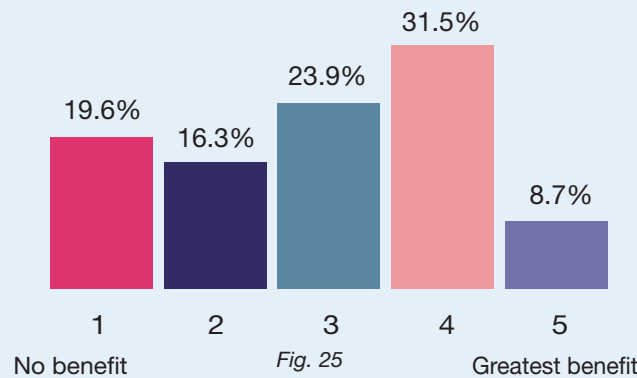
The importance of advertising revenue will usually depend on the way in which the network is funded (which may explain the wide array of retailer opinion). A retailer with a self funded network might not be interested in advertising revenue for example.

Perceived benefit of screens 'Store environment'



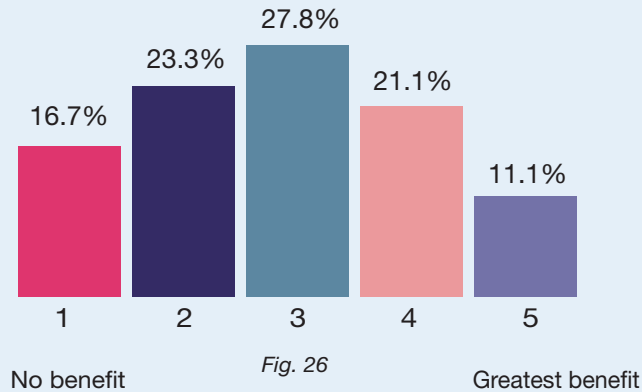
Store environment is an important factor for screen use. For some network operators, this was cited as being of no benefit. Once again, this probably applies to those networks funded by advertising.

Perceived benefit of screens 'Product demonstrations'



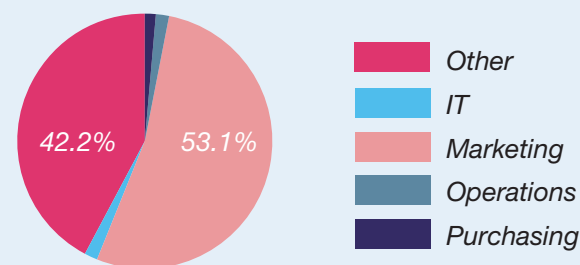
The perceived benefit of product demonstrations is greatly influenced by the type of product on sale. Supermarkets may be more interested in communicating promotional offers than product demonstrations. The opposite may apply to electrical retailers looking to 'trade up' their customer to the next model.

Perceived benefit of screens 'Store compliance'



Store compliance would not appear to be a primary motivator for using screens. Store compliance is more likely to appeal to retailers with a higher number of stores (and possibly high numbers of staff).

Who is responsible for your screen implementation strategy?



This question attempts to segment the key screen decision makers within UK retail organisations. Whilst the Marketing department would appear to be one of the key decision makers, this varies widely across retailers. 'Innovations', 'Facilities', and 'Store services' were all cited as being responsible.

Special Feature - Shopping Malls

Overview

Given that many of the retailers interviewed in previous surveys will have stores located in shopping malls, this is an area of interest for many readers of the UK Digital Signage Survey. Phase 6 of the survey attempts to record the usage of digital signage in shopping malls (which was not covered in previous editions). As well as retailers, a number of shopping centre managers were spoken to, to determine their screen usage. 221 malls were contacted, and 72 participated in the survey (whilst this is a small sample size, it represents approximately 1/3 of all malls so can be deemed representative). Of the 72 respondents, 12 stated that they were using screens in the mall (less than anticipated). A summary of the results is given below.

Do you currently use screens?

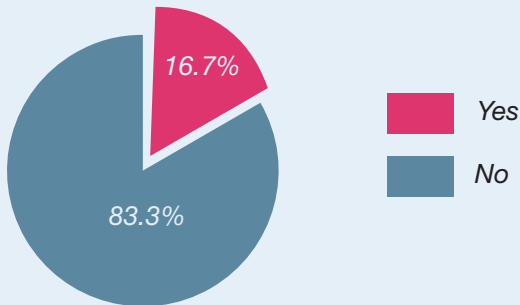


Fig. A

What size of screens do you use?

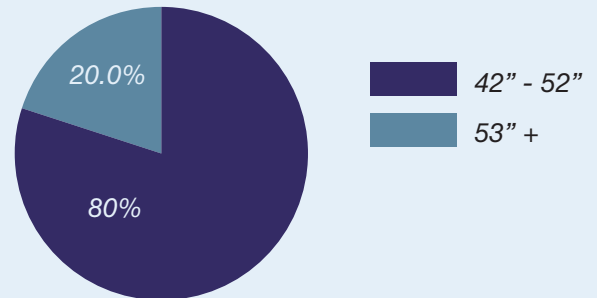


Fig. B

How is the content delivered to screen?

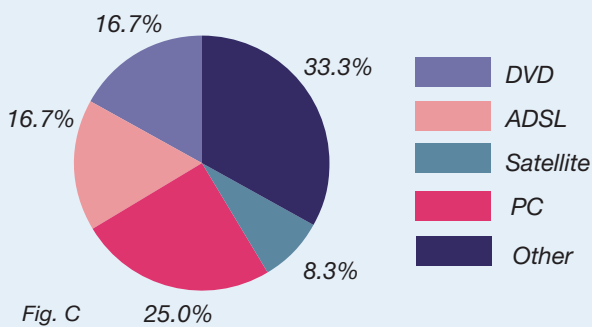


Fig. C

How often do you update your content?

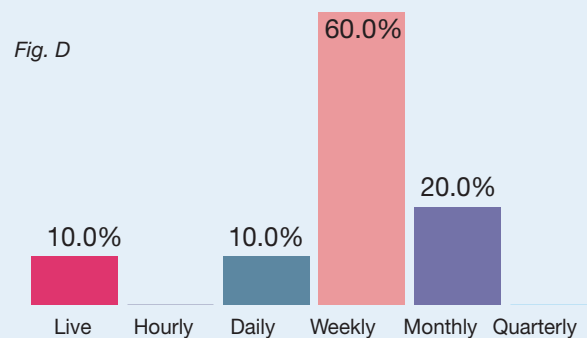


Fig. D

How would you classify the content?

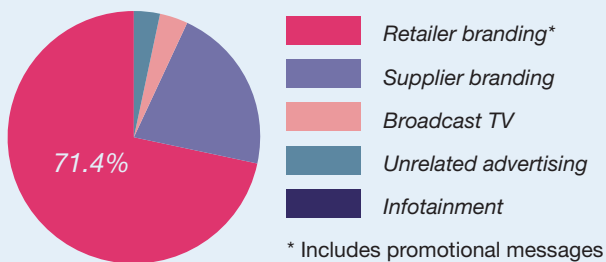


Fig. E

What is the main source of funding?

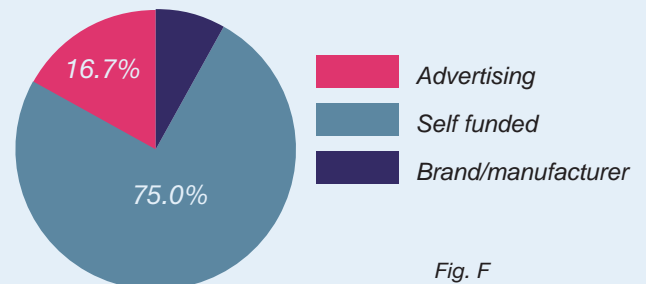


Fig. F

Shopping malls - additional observations

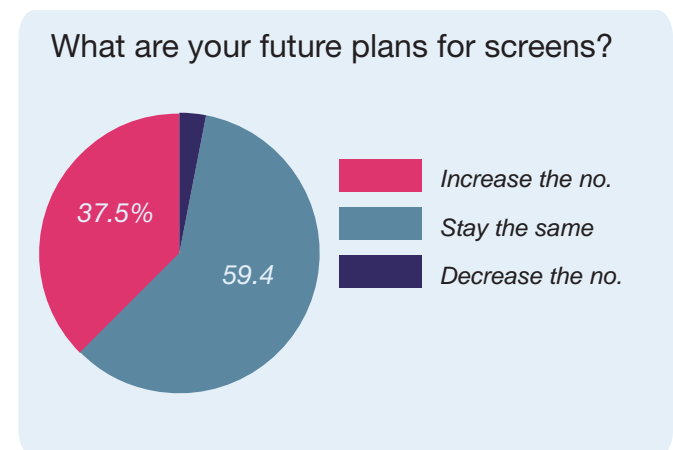
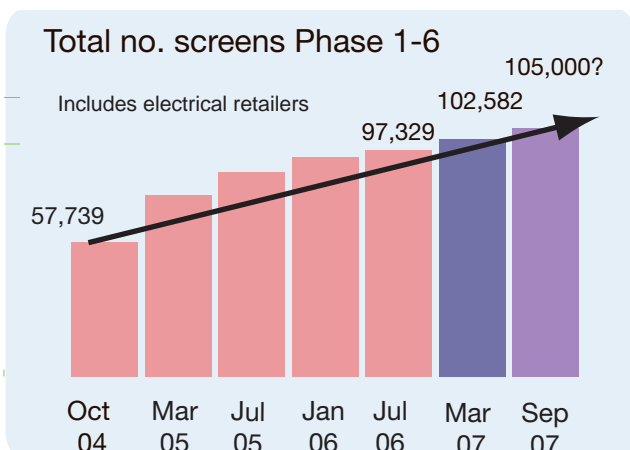
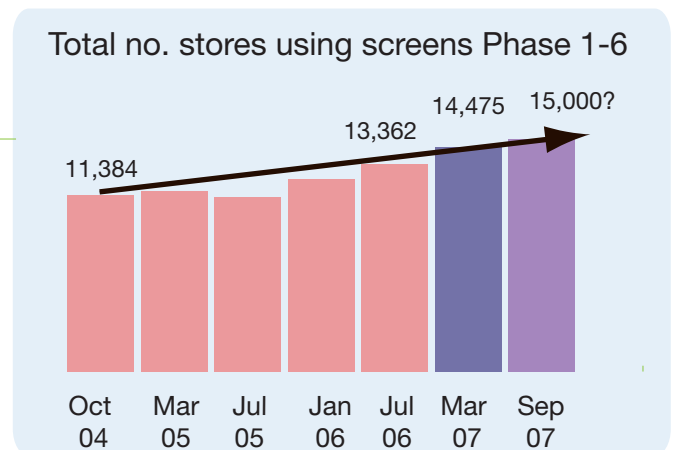
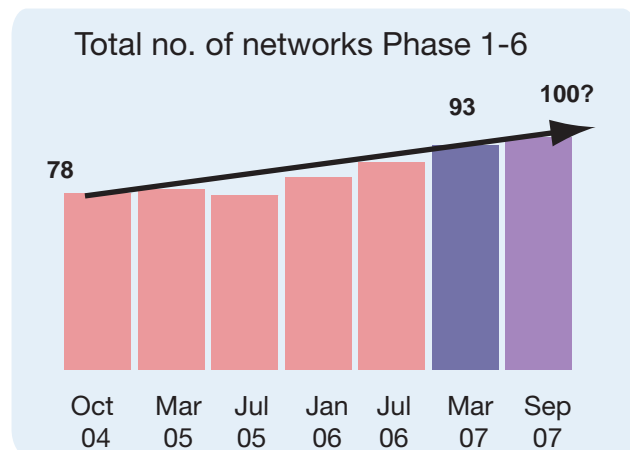
1. Less than 1 in 5 malls currently use screens -fewer than anticipated.
2. 22 of the 60 not currently using screens are considering their use in the future (there is potential for growth).
3. 4 of the 12 malls currently using screens are considering increasing the number.
3. Only one of the 12 malls with screens used sound - possibly due to the fact that many malls already use music.
4. Content is updated more regularly than in retailers stores (weekly verses monthly).
5. The majority of the mall networks are self funded (unlike retailers who seek funding from selected supplier brands).
6. It would appear that shopping malls currently look towards their tenants (retailers) for content.
7. Screen sizes tend to be much larger than those used in retailers, and several malls are using 53" screens.
8. The most popular reason for the use of screens was store environment
9. One of the major reasons for shopping malls not using screens was funding.

The future

Conclusions

Each phase of the Samsung UK Digital Signage Survey produces an increasingly accurate impression of the number, type, and usage of screens in the UK retail sector. Since the first survey, the number of screens in use has increased significantly, and this growth is forecast to continue. The reasons for this continued growth remain the same as in previous surveys:-

1. Increasing awareness of screen technology and flexibility
2. Growing awareness and acceptance of screen usage amongst retailers and consumers.
3. Increasing number of screen options (dimensions, types, and styles).
4. Falling cost of hardware (especially TFT/LCD screens).
5. The recent introduction of High Definition (HD) screens (offering clearer images).
6. Increased availability of animated content (e.g. from websites).
7. Increased availability of high speed ADSL (broadband) connections.
8. New 'solid state' media players (content can be played directly from a memory card without the need for a PC or DVD).



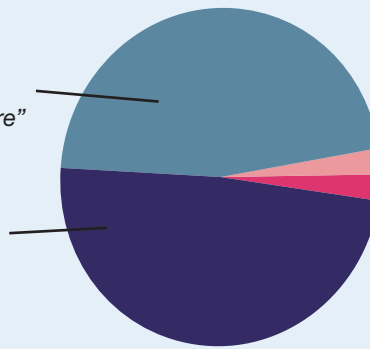
Future usage statements

46.3% likely to stay the same

*"We don't use screens and don't plan to"
"We use screens and are planning no more"*

48.8% likely to increase screen use

*"We don't use screens but we plan to"
"We use screens and are planning more"*



2.4% likely to decrease screen use
"We use screens and plan to use less"

2.4% are unsure
"We don't know"

Commentary by Barnaby Page - aka.tv

This edition of the Samsung UK Digital Signage Survey indicates a maturing market which is increasingly clear about the benefits it hopes to derive from digital signage – and confident that its investment is indeed paying off.

While there has been steady growth in the number of screen users since the middle of 2005, a large majority of the user base first deployed this medium three or more years ago. And they seem to be satisfied: while the survey doesn't directly measure churn, both anecdotal evidence and the survey responses show that it's very rare for installations of significant size to be reduced or decommissioned. And more than a third of respondents actually plan to increase their use of screens.

To some extent, then, it appears that every network is a success story. But the definition of success seems to be shifting too, with few users now expecting to gain significant revenue from third-party advertising. The approach of consensus on the achievable goals of screen networks, with branding and direct sales promotion heading the list, can only be a positive trend for the industry: if we all know where we're heading, the route there is that much clearer.

There are some surprises. While screen users are certainly taking advantage of the decline in display prices, with 42-inch sizes now commonplace (and even larger ones the standard in shopping centres), most installations are lower-tech than the industry's self-image might suggest, with rather infrequent updates via DVD. It would be interesting to know whether this really reflects retailers' needs, or whether it's a result of the age of the networks – and if so, whether there's a big upgrade season around the corner.

High on the shopping list for anyone looking to upgrade is likely to be some kind of interactivity. The typical maximum budget of £5,000 per store may not buy all the latest bells and whistles, but already a surprisingly high one in nine screens is interactive, and while the general trend is to larger screen sizes, there is also interest in more intimate seven-inch shelf-edge units.

Retailers' marketing professionals, who seem from the Samsung survey to be the loudest voices in the clamour of interested parties, will be studying with interest the success of these experiments with different screen types. And it's likely that future editions of the survey will show the continued emergence of well-defined best practice in the fusion of retailing, media and technology.

Future surveys

The 'Samsung UK Digital Signage Survey' is conducted quarterly, and the next edition is due for issue in Spring 2008. As a recipient of the survey, it is assumed that you will have some involvement in the usage of screens (or 'point of purchase') within your organisation. Retailer participation is essential to the integrity of the survey, and your views are considered extremely important.

You may be contacted and asked to participate in the next survey questionnaire. If so, your cooperation will be greatly appreciated.

All survey respondents are entitled to a free copy of the survey, and will be entered into a draw to win a 32" Samsung LCD TV!

About the sponsors



Samsung Electronics Co. Ltd

Samsung Electronics Co., Ltd. is a global leader in semiconductor, telecommunication, digital media and digital convergence technologies with 2004 parent company sales of US\$55.2 billion and net income of US\$10.3 billion. Employing approximately 113,600 people in over 90 offices in 48 countries, the company consists of five main business units: Digital Appliance Business, Digital Media Business, LCD Business, Semiconductor Business and Telecommunication Network Business. Recognised as one of the fastest growing global brands, Samsung Electronics is a leading producer of digital TVs, memory chips, mobile phones, and TFT-LCDs.

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Realisation

Realisation Marketing Services Ltd. is a London based agency specialising in the development, management, and deployment of Retail TV networks for clients across the UK and Europe. The company offers a wide range of solutions including channel development, content production, and programme scheduling (for both broadcast and interactive networks). Realisation has over 10 years experience in producing content, and has worked directly with companies such as Atari, Blockbuster, Curry's, Dixons, Fosters, Gamestation, Samsung, The Carphone Warehouse, Three Mobile, and Virgin Megastores. Realisation employ a dedicated creative team and in-house facilities and are a 'one stop shop' for any customer considering using digital signage within a retail environment.

For more information, please contact **Nick Gale** on **020 8878 3344**, or visit www.realisation.co.uk

THE SCREEN

The Screen

The Screen is an independent UK based industry association, funded by membership subscriptions & sponsorship and dedicated to the digital screen-media (or digital signage networks) industry. Launched in January 2004, 'The Screen' holds regular events and maintains a number of working parties to encourage active member involvement. The nature of the digital screen media industry means that there is a broad stakeholder base however most members will come from companies directly interested in the provision of screen-media industry related products and services. For example existing members include; Consultancies and agencies, Media related businesses, Network owners and operators, Technology and infrastructure service providers, and Providers of finance to the industry.

For more information, please contact **James Henry** on **0870 046 3038**, or visit www.thescreen.org

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