

SPECIAL *report*

Information Intelligence by  **cleverdis**

Achieving Viable Metrics – Finally!

*Out of Home Digital Media
Comes of Age*



TRUMEDIA

Every Face Counts



Richard Barnes
Editor-in-chief
Cleverdis



Over the past few years I have attended numerous conferences on Out of Home Digital Media... all of which have been bullish about the future of ad-supported business models. Each time however the cry has been the same... "We know this is the most exceptional way to reach and influence customers... but how can we get the metrics to prove this to the agencies and big-name advertisers?" Until recently, the only way to collate any figures was to equate foot-fall in a shop with the number of screens in the shop... but no-one knew who saw what ads or how effective they were. Digital Signage was thus the poor cousin of TV, despite the fact that it has a captive audience of people ready to buy! This was the main factor impeding the growth of any advertising driven business models in the sector. Today, this has changed. TruMedia provides real-time, automated audience measurement solutions that deliver accurate viewing measurements for out-of-home indoor advertising on digital signs, TV monitors, branded fixtures, posters, display windows and in-store product displays. Their solutions make it possible to truly measure the effectiveness of displays and understand consumer behaviour. In other words, shop-owners and advertisers can not only compute their advertising cost per thousand, but even adapt their advertisement in real time according to their audience statistics. For the first time, real ratings can be determined. TruMedia's solutions generate true, real-time viewing data for digital, product and window displays by analyzing face images of people watching the displays. Viewers' face images are analyzed in real-time to yield business-critical information such as true face towards counts, individual exposure times and indicators for attention or level-of-interest. What this means in a nutshell is that in the future, thanks to this evolution in the measurement techniques, advertisers will have more detailed information than with any other media form available today. From being the poor cousin, Out of Home Digital Media is set to become the "rich uncle"... This SPECIALreport aims to give you a full overview of the current state of play in this respect, as well as outlining the unique selling points of TruMedia in the domain.

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Towards a True Industry Standard

The Birth of Metrics and Analysis for Digital Signage

Mr Gura, please tell us about TruMedia's background...

TruMedia spun-off from the video surveillance company, MATE, of which I was CEO. This technology was used for five years for customers such as the US Air Force, Canadian Navy and Pfizer. About a year ago we discovered there was a growing market in the field of digital signage and decided to launch TruMedia. We transferred a team of 8 people to TruMedia then. Today we have over 50 employees and run offices in Amsterdam, San Francisco, and Barcelona, with research facilities in Israel and our Headquarters in Tampa. So we're growing very fast. It is important to note that unlike homeland security applications TruMedia's solutions are fully respectful of the audience's privacy and are completely anonymous: no personally identifiable information is ever collected; no video or still images are ever recorded and there is no personal data repository.

Who are the main clients and what is the roadmap for the company?

Our main clients are the largest retail signage networks. TruMedia is doing very well in the US, with many companies like Reactrix and AdSpace already deploying iCapture. We're also working with companies like PRN in the States who run the Wal-Mart network and CBS Outernet who are growing in the retail sector. In Europe we have large customers such as the La Caixa bank in Spain who are rolling out major digital signage network.

Digital Signage has become mature now, but advertising through digital signage networks is still at a very early stage. How big do you think it's going to get?

There is only one way for this market to go, but for this there will have to be a currency that people can measure. Right now, if you are an advertising agency, you might have a budget of millions of US dollars for a campaign; of which only the

last fifty thousand dollars might be allocated to a digital signage network as a favour or an afterthought. What is needed in this industry is a measurement standard. We need to have an equivalent of Nielsen in Digital Signage.

TV and radio are analysed in 15 minute segments, but what you are proposing here gives metrics in real time. So while before there were no metrics at all for digital signage, it appears that your system will now give more detail than we have for other media...

Yes, that's correct. Real-time metrics is essential if you want to be able to target messaging to your captive audience. TruMedia goes beyond just audience measurement, our real-time metrics make it possible to target ads to the current viewing audience based on their demographics. I believe that one day people might even use the same technology for in-home measurement. It's much more advanced than current systems, because we can not only prove that the person is watching the screen – not doing something else while the screen is on, but actually proactively change the message to a product or service that is relevant to them. For now we hope to get to a point where our measurement technique is used as a standard in all markets for digital signage.



Moti Gura
Chairman
TruMedia

Moti Gura is the co-founder and Chairman of TruMedia. Under his visionary leadership, TruMedia has become the worldwide leading provider of real-time audience measurement solutions for out-of-home advertising on digital displays, window displays and in-store product displays. As active Chairman, Mr. Gura is responsible for defining the company's strategic direction, focusing his efforts on strategic partnerships. He also ensures that TruMedia has an exceptional technology road map delivering end-to-end real-time audience measurement solutions. With over 25 years in hi-tech entrepreneurship, Mr. Gura has led a number of incubators from start-up to successful IPOs.





The State of the Market



Steven Keith Platt
Director
Platt Retail Institute

Mr. Platt is the Director of The Platt Retail Institute, a retail research, consulting and analytics firm. PRI's mission is to initiate and secure the funding of studies by its Research Fellows on specific retail business issues. PRI functions as a conduit, bringing together retail executives with leading researchers.

He received his Bachelor of Science Degree in Finance and Marketing from the Boston University School of Management. He also has a Law Degree and a LL.M. in Taxation from Boston University, where he served as Articles Editor for the University's Journal of Tax Law. He has co-authored five major research papers about digital communications networks, and has published articles in journals including Digital Signage Quarterly, Display & Design Ideas Magazine, the Retail Navigator, VM+SD Magazine, the National Association of Store Fixture Manufacturers Magazine, POP Magazine, the Journal of Mergers and Acquisitions, the Computing Technology Industry Association's Computing Channels Magazine, The Mergers & Acquisitions Handbook, and the Corporate Legal Times.

How important is the provision of good metrics going to be in the growth of advertising-supported Out of Home Digital Media networks?

Metrics are critical in a number of retail applications. In supermarkets for example, metrics are a higher requirement as opposed to such things as transit facilities. An interesting thing is that this media is being held to a particularly high standard that one doesn't see in TV, radio or print. It might be because it's new or different, but having said that, that is one of the main attractions of this medium, because today it offers the potential for much more exacting metrics and feedback that will ever exist in radio or TV.

Indeed, with TruMedia it is now possible to count exactly how many people are watching a screen and exactly for how long, with increasingly detailed demographic information...

Yes... not only does it group what we might term "awareness"... that is to say who is in the store, watching the signs in a historical perspective, including demographics; it makes the medium much more relevant because of that, because one can target better. It also gives you the chance to work prospectively. For example, four twenty year old girls enter my store... all of a sudden, I might be able to start running ads geared towards that group, which I couldn't do before. Then potentially you will be able to tie that in to the PoS system, and all of a sudden you can tie in all kinds of things... "the ad ran, we targeted the ad, we got this kind of impact... the next time four girls came into the shop, we ran a different ad and gave us a better response... so what does that tell us about the ad? What does it tell us about its timing?" That's one of the reasons this industry is so phenomenal, because you can get amazing types of metrics that will enhance the business and its ability to create a result. In other words, awareness is only a portion of the buying process. Here, we go way beyond awareness.

That's a start, but at the end of the day, does an ad work? If I can tell you it works and that someone bought something in response to it, that's a lot more relevant than just being able to say "...hey, somebody looked at it".

How big is the part of the market that will be depending on these metrics... where the potential big ad agency budgets are set to fall?

We're working with major multi-national companies that are putting the final touches on software systems to power increasingly sophisticated systems, and in this sense, the market is set to grow in a big way. Within two years, it's going to be huge and within five years, I'm convinced it's going to be bigger than TV. There's no doubt about it... because there is a much more effective delivery system in the store, where the consumer, the money and the product meet. And the ability to analyse if an ad is working or not working, and to what degree, is going to be a key driving factor.

PRI is committed to the advancement of the science underpinning Digital Communication Networks. Major research papers include the following:

- #1: Implications for retail adoption of digital signage systems
- #2: Establishing retail digital signage as a new medium and measuring its effectiveness
- #3: Leveraging the impact of retail digital signage advertising through behavioral merchandising
- #4: Deployment and test of a retail digital communications network by the united states postal service
- #5: Impacting the customer experience at a bank branch through a digital communications network
- #6: Test results from a bank branch digital communications network
- #7: Test results from a mall based digital communications network (available 1st Quarter 2008)
- #8: Test results from an Out-Of-Home digital communications network (available 2nd Quarter 2008)

Capturing Your Audience

Is anybody watching? When... and for how many seconds? What are the demographics? All these questions and more are now being addressed by iCapture... at the heart of TruMedia's audience measurement solution... We asked Catherine Moore, International Sales Director of TruMedia, to give us an overview of the futuristic possibilities offered by TruMedia's tracking and analytical devices...

iCapture generates true viewing data for digital displays and screens by analyzing face images of people watching the displays. Proprietary video analytics technology is used to automatically detect and track faces captured by high-resolution cameras in order to determine:

- Actual Impressions – by detecting and counting only those viewing the media
- Viewer Demographics – gender and age-group
- Impression Length – duration of viewing
- Impact Ratio – viewers vs overall traffic (when combined with our iTally overhead people counter)

The system is reported to be easy to set up and operate. All the operator needs to do is install and orient the cameras... iCapture does all the rest.

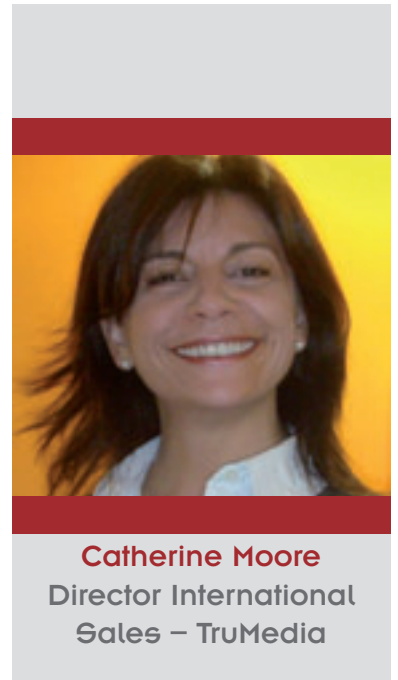
What are the main features and benefits of the system?

There are several...

- Accuracy in audience counts: iCapture provides a true count of impressions with an accuracy that surpasses any other direct or indirect measurement technology.
- Detailed, real-time information: iCapture provides more than just viewer counts. Demographics segmentation and face-towards time measurement allow better media planning and targeted advertising.
- Proactive: Real-time viewer counts, behaviour and demographics can be trigger a change in the advertisement, tailoring it to the viewer.
- Non Cooperative: iCapture does not require audience cooperation, providing true and unbiased information.
- Scalable: The iCapture SmartBox, is a small video processing device deployable on a large scale. Unlike PC based measurement systems, it is small enough to be attached to the back of a digital signage screen.

Can you please tell us about the new version? What is different about it?

In October 2007, TruMedia Technologies announced the worldwide release of Version 1.4 of iCapture providing gender and age-group (adult/child) information – important demographics which will allow



Catherine Moore
Director International Sales – TruMedia

our customers to understand their audience in more depth. The latest release also includes extended viewer tracking capabilities, correlating multiple gazes of the same viewer that may be up to 30 seconds apart. So even if viewers temporarily face away from the screen, the correct number of unique viewers and accurate attention spans are reported.

Aren't people worried about their images being recorded?

The question of privacy is an important one. Wherever there are cameras there will always be the concern that “big brother is watching”, but this is not the case with TruMedia. We are fully respectful of the audience's privacy... No images are ever recorded, and no uniquely identifiable data is extracted.

iCapture the audience measurement system for Out of Home Digital Displays





Tony Jarvis
Executive Vice President
– Global Research
Clear Channel Outdoor

Tony Jarvis joined Clear Channel Outdoor at the beginning of 2006 as Executive Vice President – Global Research and is heading the company's ongoing efforts to create harmonized audience measurement methodologies, analytic tools and consumer insights worldwide for its advertisers and their agencies.

Tony extensive experience includes playing leading roles with some of America's largest advertisers, including: Procter & Gamble, Diageo, Danone, M&M Mars, Lea & Perrins, Ford and GSK generally focused on improving ad effectiveness, accountability and ROI. Tony earned his MBA from the University of Massachusetts and was an Olympic swimming finalist and the British Olympic Captain in Mexico 1968.

Out of Home Media

Technology is on its side!

Out-of-Home Media Today

Generally speaking, especially in western countries, there are two growth media: the Internet, of course, and Out-of-Home media. Out-of-Home delivers a brand message to consumers as they drive along a highway, walk to the bus shelter, take the bus, or visit an airport. There is no remote control to flip the channel and avoid the commercial. Consequently, advertisers have been increasing their investments in the medium globally because they recognize Outdoor's powerful ability to deliver a creative message to their brand's target group in an innovative and impactful manner. Significant investments are also being made by companies like Clear Channel Outdoor, both in terms of new panel design and format technology, as well as in audience measurement approaches and systems around the world based on evolving global standards. Clearly, Out-of-Home is a real growth media, with technology driving novel creative opportunities and increased accountability for advertisers and media vendors.

Technology and Audience Measurement

Development and delivery of Out-of-Home audience measurement (ratings) is accelerating at a great pace worldwide, so there are increasing opportunities to embrace technology. This is especially important as Out-of-Home requires an integrated research solution (typically based on multiple travel and traffic surveys usually together with government or institutional "movement data") due to the very large number of signs throughout a vast network of possible paths and venues that the consumer can travel each of which need to be measured as accurately as possible. Consequently Out-of-Home ratings development takes a very different tack to the conventional

single survey, single sample approach of measuring other major media audiences "left over" from the 20th century. Technologies such as: the internet and availability of highly detailed mapping; trip-routing estimation techniques; GPS within travel meters or in mobile phones; people-counting, including face recognition; etc. all offer Out-of-Home audience measurement development opportunities. These technologies can potentially address reduction of respondent-burden, accuracy, diversity, economies of scale or simply provide multiple sampling variations across diverse locations and geographies often very efficiently as part of an integrated measurement solution.

Most major western European countries have released Eyes-On or Visibility Adjusted Contact (VAC) ratings for Out-of-Home real commercial ratings. This ratings metric is very different from the way other major media are being measured around the world. It represents the number of people in a target group travelling outside their home, or standing at a bus shelter, or on the street when a bus goes by, or in a mall that will actually see the Out-of-Home advertisement. No other major media is measured in this manner. All other major media are "merely" measured at the "opportunities-to-see" level, which typically requires serious adjustments (usually downwards) to reflect an Eyes-On or commercial ad ratings estimate.





Several countries, notably the UK and Germany, are completely upgrading and enhancing their OOH measurement approaches and the US will release its very first Eyes-On ratings across all 200+ DMAs for all audited roadside and street furniture by the end of 2008. Each of these initiatives will embrace new approaches or technologies one way or another. The investment required is being driven by both the advertisers' demand for more comprehensive measurement across more Out-of-Home formats and the positive effects of enhanced metrics on revenue growth for all involved.

As we begin to roll out the rating systems for Outdoor in more and more countries, global harmonization is fundamental and potentially offers advertisers a unique opportunity. Whether the advertising is in North America, China, Australia, India, Africa, or Europe such country-by-country comparability and equivalence is critical to clients who now optimize their major brand marketing investments worldwide and are seeking to include Out-of-Home as a key part of their marketing mix worldwide.

Out-of-Home revenue growth will continue as more and more countries deliver audience rating measurement. Many major countries already have audience rating measurements, but for many other countries this is still a dream. There is a great deal of work and investment ahead. Advertisers and agencies rely heavily on media ratings to make multiple channel media mix decisions. The good news for Outdoor is that as measurement rolls out, it will underline the delivery of large mass-niche audiences. Outdoor tends to deliver many more target prospects for the brand than other media "for the dollar".

As the largest international Out-of-Home company, it's appropriate for Clear Channel Outdoor to assume a leadership position in enhancing and improving the OOH ratings that already exist in some countries. However, it is also very exciting to identify countries where there are no ratings and encourage the development of measurement techniques and technology to deliver better accountability for our clients and agencies there.



Why Size Matters – Introducing iCapture Smart

Industry experts predict that 2008 will be the year of device based DS solutions. Personal Computers are not the sort of devices that will be used to run digital signage solutions. It is



expected that the marked trend for large installs will be to choose signage solutions based around devices and appliances. A lack of space and the need to keep costs down will make miniature embedded devices the popular choice. The trend will be led by Retailers wanting to buy screens with intelligent devices embedded or attached to the back of them. The prediction is no different for DS audience measurement solutions.

The iCapture Smart solution, recently released by TruMedia, includes a

miniature DSP based video processing device, the iCapture SmartBox, with embedded video analytics which eliminates the need for a PC. The iCapture Cam is connected to the SmartBox which is connected directly to the network sending all impressions data to a central database and reporting server. Its small size and minimal maintenance requirements keep costs down and makes it the ideal solution for large deployments. This stand-alone robust device is easy to set-up and use with periodical maintenance and updates carried out remotely.



Dr. Itzik Wilf
Chief Technology Officer
TruMedia Technologies

Dr. Wilf has 27 years of experience in research and product development in the Israeli military, defense industry, automatic optical inspection industry and digital video companies in the fields of computer vision and image processing. Itzik is the founder of MATE Intelligent Video – which develops and sells advanced products for video surveillance based on proprietary, real-time video analysis algorithms. Dr. Wilf is a graduate of the Technion in Haifa with M.Sc. and Ph.D. degrees from Tel Aviv University in the fields of image processing and computer vision.

“We are very impressed with TruMedia’s audience measurement solutions and are pleased to be able to offer Scala partners the opportunity to measure their viewing audience and also accurately target their content to the viewer and maximize advertising effectiveness”. Gerard Bucas, Scala

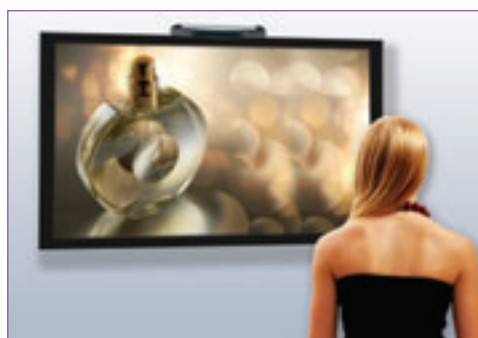


Targeted Content Change

No Longer Science Fiction

Taking the next step on from just audience measurement systems, TruMedia made a joint announcement with Scala (the world’s leading provider of end-to-end digital signage software) at the Scala EMEA partner conference in Amsterdam in October 2007, announcing the creation of the iCapture PROM (PROactive Merchandising) Solution. PROM is an Application Programming Interface (API), which enables real-time integration between the iCapture audience measurement system and Scala’s InfoChannel 5 digital signage platform. Using PROM, digital signage content can be adapted to match the viewing audience demographics for truly proactive advertising. Dr Itzik Wilf led the development of the system...

Early in 2007, we realised that audience measurement should not just be about reporting, but could be proactive -- matching the content displayed with the audience characteristics. When we started discussing this, our initial intuition was that it was something very futuristic, like Minority Report, when Tom Cruise walks through the shopping mall and gets targeted advertising based on his interests. We discussed the concept with industry leaders at the Digital Signage Expo Chicago in May and the responses we had were very favourable! As a result, we looked at ways of implementing it... what type of information should be exported to the content management system, and how this information could be exploited from the content management side.



How far can this go?

First of all it is important to clarify that our solutions are a far cry from Minority Report! In the film individuals were identified from eye scans and then advertising was targeted specifically to them. We do not recognise individuals and we don't keep any images or data at all. We do however analyse the current audience demographics, and size. If no-one is in front of the display, there is no real value in showing a commercial. However if there are a lot of people, or the iTally OTS (Opportunity to See) overhead people counter sees there are a lot of people in front of the display, but who are not necessarily watching, you can launch your most valuable commercial... Maybe the previous content, which was a newscast, brought the attention of a lot of people and the number can be used as a criterion for pre-selections. But a number in itself is not sufficient... Here, you can make a distinction between senior citizens or young people, male and female... then there are children, or family groups. Soon we will be adding ethnicity and additional age groups, but the integration with content management systems is generic, so the more information we provide about the audience and its demographics the more appropriate the ad for the audience... Of course you have to be careful in the way you design and use information. You don't want to create the impression that people are being watched. The adaptation should be subtle!

Case studies



“Mall in the Family”

ADSPACE NETWORKS AUDIENCE MEASUREMENT PROJECT IN US MALL

Project Overview

Adspace Networks Inc. (web site: www.adspace networks.com) builds, owns and operates the Adspace Mall Network, a network of full-motion digital displays located throughout select malls across the United States.

Objectives

Digital Signage has remained a largely unmeasured medium. Advertisers are asking for proof of effectiveness and Adspace wanted to provide that proof by accurately measuring audiences viewing their digital signs in malls. The objective was to determine how many people watched the screens, how long they looked for and get a better understanding of viewer demographics.



Solution

TruMedia iCapture audience measurement solution was installed on 6 screens in 3 different malls. The iCapture Ultra Cam, a unique high-resolution, wide dynamic range camera was placed above each screen and oriented towards the audience. While video-based solutions often have difficulty functioning accurately with bright back lights, harsh lighting conditions were easily overcome with the use of these wide dynamic range cameras. Viewers' faces are analyzed in real-time by the iCapture video processor to determine true "face towards" counts and individual exposure times. Further real-time classification algorithms determine the viewer's gender and age group.

The project is still under way. Final results will be released early 2008.

Targeting Inspirational Content

AUDIENCE MEASUREMENT PROJECT IN CLUB & BAR TV

Project Overview

ON. (web site: www.thisison.nl) runs a digital media network in more than 500 of the top clubs and bars in the Netherlands. They provide the visitor with a combination of entertainment, relevant information and branded content. The outlet owner is thus able to communicate with his customers through several intelligent tools. Working closely with brands, ON intermingles inspirational content targeting 18 – 35 year olds with brand messaging of different kinds.

Objectives

The objective was to determine how many people watched the screens, which content was more eye-catching,



how long audience watched for and to gain a better understanding of demographics. ON needed metrics for their bars, advertisers and media buyers to be able to provide them with several standardized audience and effect results.

Solution

The iCapture audience measurement solution for digital screens was installed on a screen situated behind a bar within a night club. The iCapture Ultra Cam, a unique high-resolution, wide dynamic range camera is placed below each screen and oriented towards the audience. With smoke machines, dark lighting and spots shining directly on the screen – this was one of the most difficult environments iCapture has been tested in to date.

According to Arno Buskop, ON Marketing and Research Manager, "The results look promising. There are still several hurdles to take, but in the far from optimal condition they need to work in (dancing people in a dark environment with disco lighting) they are doing a real good job".

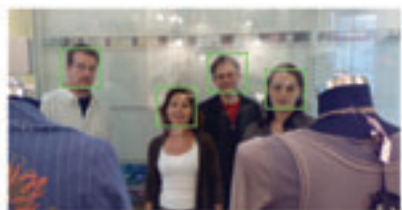


Counting on YOUR CUSTOMERS to Make Business Better

How it Works:



Video Stream from Cameras



Face Tracking Engine

Audience Data and Reports



TruMedia doesn't just make systems dedicated to digital signage, but has also developed specific systems to measure consumer behaviour in such a way that the data can be usefully exploited.

iGAZE Consumer Behaviour Measurement

iGaze, TruMedia's consumer behavior measurement solution for in-store product displays shares most of the technology and design principles of iCapture. However, unlike iCapture, iGaze estimates gaze direction to provide location-specific measurements for product shelves. It is a real-time automated solution that is embedded, small in size and does not require audience cooperation.

iGaze™ is designed for retailers who invest a great deal of resources in setting, maintaining and updating product exhibits in order to capture shoppers' attention or to direct traffic towards the store and Points of Purchase (POP) inside the store. Using iGaze™, retailers and research firms can measure the number of viewers and their engagement levels when viewing window and product displays. By analyzing the data provided, the effectiveness of these displays can be determined and messaging can be changed to optimize shopper marketing. Statistics can be collected from multiple locations to create industry-specific benchmarks.

iGaze™



iTally™



Last Day: Inc7-out:43 Last Hour: Inc7-out:43

iTALLY Opportunity to See (OTS) People Counter

iTally™ is an overhead people counter that uses a hi-resolution mini-dome camera connected to a small video processor to automatically count traffic that enter or exit an area of interest. Data is stored in the iCapture or iGaze database and reporting server, where it can be retrieved and correlated with viewing measurement reports. iTally is capable of bidirectional tracking and accurate counting even at high traffic density levels.

iTally is a part of TruMedia's comprehensive audience measurement solution. When Combined with iCapture and iGaze, iTally makes it possible to compare traffic counts with audience counts and calculate impact ratios. Combining these solutions make it possible to not only know how many people and looked and how long for, but also measure the number of potential viewers in order to establish the effectiveness of the display in attracting passing traffic.

Conclusion



Anything of Value Must Be Measurable

The development of the Digital Signage market has until now suffered from the absence of reliable metrics, and, as a result, a lack of measurement of Return on Investment.

It is thus that one of the first major workgroups of APCAD (the French Association for the Promotion of Out of Home Digital Media) was dedicated to the establishment of standards in this sector, registering the name "Digimétrie" for this purpose.

When an international player such as TruMedia proposes, in real-time, automated audience measurement solutions that deliver accurate viewing measurements for out-of-home advertising on digital screens, TV monitors, posters, display windows and in-store product displays, it's the entire market that applauds its efforts.

The TruMedia solutions presented in this report also allow us to truly measure the effectiveness of the displays and understand consumer behaviour and what was in the realms of science fiction not so long ago – the adaptation in real time of messages for the audience in front of the screen – is now reality.

We are particularly happy to be able to enhance public and industry awareness of these new possibilities thanks to this SPECIALreport, thanks to the fact that these solutions are in fact a real contribution towards the entire Digital Signage industry.



Gérard Lefebvre
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