

Talking Set-top Box Renewal While Skating on Thin Consumer Ice

By Leo B. Willner, Ph.D. with R. Gregory Kalsow,
Partners at Alvairi-Derfler Associates

With combination Motorola/Moxi 'fat' set-top boxes coming soon by the tens of thousands to cable-subscriber homes serviced by Comcast, Charter and Adelphia, a next round in the battle between satellite and cable for subscriber hearts, minds and wallets is underway. Still all the fancy cable boxes in the world may not be enough as cable faces off against Rupert Murdoch the new kingpin at DirecTV and Charlie Ergen master and commander at EchoStar — two premier swordsmen. This confrontation will be energized by the advanced capabilities of the Motorola BMC (Broadband Media Center) set-top box and its Digeo Moxi systems containing integrated media goodies such as home networking and advanced DVR. This STB, and others of its kind from the likes of Scientific Atlanta and Pace bring the prospect of true convergence and interoperability further into view for the networked multimedia multitasking home. Therein, in combination with the TV, the PC, the gamebox and even the cell

"Still all the fancy cable boxes in the world may not be enough as cable faces off against Rupert Murdoch the new kingpin..."

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Due to the length of the two articles in the May issue, Kalsow's Back-Channel will return next month.

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phone, all can share MPEG cable TV content, Internet IP traffic, PVR enabled stored media, Voice over IP and applications of all sorts including the real coming of Interactive TV systems. Even an integrated DVD player is soon to be part of the package — perhaps one that includes recording capabilities of its own. To the satellite service operators such as DirecTV and EchoStar cable is now making the clarion call: ***En Garde!***

Amazingly, a good deal of what was once the much-heralded advanced media of the future now appears to be truly already on its way! Indeed these

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"Validating the Middle Ground"



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new systems contain much of the functionality of the Multi Stream Machine or MSM described in the December 2002 issue of CMS NewsLine entitled *A Most Satisfying Experience — When DVD and PVR are Combined*. It astonishes how a little competition among cable, satellite and the RBOCs (Regional Bell Operating Companies — such as Verizon and SBC) can bring all these reluctant media gatekeepers up the parapets to defend their turf with alms for the poor consumer. As a consequence the commercial competition for consumer dollars is far from decided; as ever more powerful technology is sure to advantage or disadvantage each of the players in turn. So we had better all stay tuned and watch the fun while enjoying the marvelous innovation — as in TiVo and WiFi.

As with any aspect of computing, television, video or electronic communications today, including the Internet, we must always remember to be mindful of Microsoft as we ponder the possibilities. Here the underlying issue is the resolution of the ideological and economic struggle between the STB and the PC as to which platform will ultimately control the network that is ‘The System’ (as the folks at SUN like to say) along with its many applications. This gathering battle royale will take years to resolve as the economic and technical contrasts that need resolution slowly emerge to determine which approach ultimately prevails. Ask Bill Gates and he will tell you that STBs

are but specialized limited PCs that by their very nature are destined to a lesser role in the overall scheme of things. Ask any CEO of a major MSO for an opinion on this and you are likely to hear that in the entertainment and communication sectors equipment breakdowns, shutdowns, crashes, losses of content, viruses, worms, Trojan horses and the rest of the techno uncertainty of the PC world will never be tolerated. As those who attended Digital Hollywood at the Beverly Hilton Hotel three years ago saw

projected in giant letters in the main ballroom prior to the keynote address: “PCs Suck!” were reminded, most consumers are not computer nerds who love a technical breakdown. Certainly not, even if it is rationalized away

by Bill Gates and his philosophical reflections of ‘the truth’ in Microsoft speak. Instead, after a long day of work most viewers expect their TVs and their cell phones to work properly all of the time, and seldom to fail. If so, exit Bill Gates and WinTel stage right — but only time will tell.

If this turns out to be correct, then the STB will stay at stage center for both cable and satellite, while the PC remains relegated to the home office and Starbucks. Yet much remains to be sorted out before this messy commercial battlefield can be cleared of its victims so the victors may raise their trophies in glory. While both sides are sure to disagree with the following assessment, it still appears a prima-facie fact, at least to some degree, that the satellite folks protect

“...after a long day of work most viewers expect their TVs and their cell phones to work properly all of the time, and seldom to fail.”

their lesser technological offering by way of excellent customer attention and service while the cable clans retain a degree of the mindset and arrogance of the oligarch. Just try to get a little service out of these folks and you might wonder what you as a subscriber are worth to them — certainly not the \$3,500 to \$4000 per subscriber that Wall Street uses to estimate goodwill for cable mergers and acquisitions.

In fact, as our many friends in the cable business may recall, when satellite owned 10% of U.S. households as their customer base just a few years ago, cable pundits and cable CEOs alike were adamant that satellite, due to limited interactivity capability, could never go beyond an 11–12% market share of U.S. Households. As satellite now owns a 20% market share one has to wonder who was and who is now fooling whom? We must all remember that consumers buy convenience and they always will. Not the joy of engaging cable voice mail messages in a vain attempt to get a modicum of service when one's cable goes black.

Will Rodgers, that great American wit, liked to remind folks that: “A fool and his money will soon be parted!” As the history of technology has revealed again and again, the convulsions of rapid technological change may sooner or later make a victim out of just about anyone. Think of the brilliant EU Concorde airplane or the SST models of U.S. and Soviet Union design. Who would have imagined they too would

fail the ultimate economic test and disappear? For this reason it is much too soon to herald U.S. cable operators the winner and the RBOCs, the satellite folks and the PC makers the losers in the home delivery of communications and content. Much too soon in fact!

Nonetheless, cable does indeed have a technological advantage right now, and it is therefore their game to lose. Just think back to the braggadocio of a Mr. Michael Armstrong, then CEO of a colossus called AT&T, who proclaimed victory over all the domains of telephones, computers and cable.

Come to think of it, does that sound a bit like Comcast's Brian Roberts of today to you? Let us hope not, and, as always, wish them well. These days the once noble ‘Armstrongs’ of the technological bubble can “miss the meat and curse the

bread!” somewhere in the outer reaches of cyberspace while the rest of us try to repair the damage. “Tomorrow? Tomorrow they may be themselves with yesterday's seven thousand years!” Therefore, while the battle for dominance is joined and the search for the winning STB combination in the integrated multimedia home goes on, no one but a fool would risk naming a winner. Not even those ‘random walk’ pied pipers of failed ventures on Wall Street.

Somewhat overlooked in the ever-growing complexity of client–end systems is the practical relationship

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between the technology built into the STB and the revenue models it can enable and support. Some experts have over the years pushed for keeping higher level capabilities primarily at the headend away from the consumer (echoes of IBM's former centrist past) as a more practical and economic approach. VOD is one such example; greater control, better digital rights management and lots of flexibility are a few of the benefits of this approach. Yet it now seems to some that this line of reasoning may be imperfect as well, as more and more applications employ a broadband and Internet IP approach that favors the use of 'thick' client boxes. In a world that is moving toward a greater degree of 'lean-forward' interactive media behavior, as in ITV, a greater capability within the STB or within the home network system may be preferable and even inevitable. That appears to be one of the several 'drivers' behind a growing acceptance of 'thick' client STBs such as the Motorola BMC and DCT 6412 or the Scientific Atlanta Explorer 8300.

Hidden from view in the reverberations of the competition between cable and satellite is the massive cost of this economic struggle for market share. After all, fancy STBs cost some \$300 and at times even twice that much. For the satellite folks at Echostar and DirecTV headend DVR and VOD cannot be a practical alternative, as their technology does not favor two-way pipe solutions. Therefore 'thick' is much preferred for satellite STBs and

these folks often give them away for 'free' in order to steal subscribers away from cable. For the cable people the 'thin' client solution is always far more economic at some \$100–150 per STB. However, due to satellite, their desperate need for DVR capability with which to compete has changed this cost argument and 'thick' is not that thick-headed after all for cable any longer. It makes more and more sense for the cable guys to bundle DVR, DOCSIS, VoIP and DVD into their boxes in order to hold onto top subscribers and even raise their revenues. As the comedian Jackie Gleason would say: "And away we go!"

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The cable MSOs, with some help from CableLabs, have embraced the light of broadband as a massive new source of revenue for cable. Consequently they have, to a degree by misdirection, come to accept the 'open' network Internet existing side by side with their cloistered MPEG and DRM content world, the traditional cable service gated community. This happy circumstance has in a most serendipitous way brought into contest a competition between applications, content and services that are Internet based and those that come by way of more traditional cable 'channels'. The one is an ORCA™ or Open Revenue Channel Access system where anyone can play, while the other is a cable 'headend' neighborhood based system chock full of private delivery systems and applications. For these reasons the economics of the open network versus

side-by-side closed network vary widely in terms of capital requirements as well as operating costs. For example, CinemaNow and MovieLink deliver videos via Internet ISPs coming to DOCSIS modems at enabled cable subscriber homes via cable, while the same movies are available to the same TV via an iN DEMAND delivery system connected to the subscriber's local cable provider system headend. This is such a real competition that it might have pleased the likes of an Adam Smith or a John Maynard Keynes. Can you believe it?

For the cable operator the difference between broadband and standard cable is massive.

In the former the cable operator is simply a utility, an access service provider, nothing more. No phony add-on services here or proprietary systems, content and the like, just an efficient pipe. In the later, the idea of the walled garden remains fully in bloom, perhaps to ultimately die on the vine. In the end it will have a lot to do with the STB and the rest of the home network. So stay tuned and see what Motorola, Scientific Atlanta and the rest of the STB community innovate, and watch Microsoft try to put the kibosh on their activities – perhaps with a little middleware poison of one kind or another. As to the cable MSOs, when they finally come around to realizing that there is far more profit in running their 'pipe' as a utility for telephony, cable content, Internet and gaming than in getting lost in

managing complex applications, everyone will be better off.

Where in all of this complexity is one to find sufficient hard ground on which to make a stand or support a long-term investment? The answer, as always, if it is to be found anywhere, lies with the consumer. After all it is within the context and fabric of his or her changing life style, experience and set of preferences that the buy or discard decisions are to be made. It is the consumer who will need to adapt to new ideas and adopt new ways to effectively utilize the gathering family of electronic media to its own purpose. One might simply remember that in the end, "it is all about the experience

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(stupid)" and is likely to remain so as the only true way and the light. The joining together of so many new technologies under the banner of many standards to empower a great variety of systems and applications in

the home makes it very difficult to guess ahead as to what will happen. Yet one thing is for sure, the present family of 'fat' STBs will energize the process for some years to come. As to the PC, it belongs on the network to do the hard lifting like video editing, Photoshop graphics and the like. All in all it is an exciting time to view new media and even to do something about it — as the times they are indeed a' changing.

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The Inside-Out of Public Media

The Future of Out-of-Home Advertising

By Stuart Volkow with Leo B. Willner, Ph.D.

Lawyers and Congressmen gravitate to the question: “What did they know and when did they know it?” Advertisers are more concerned with: “What advertising was in view, and when, how and by whom was it seen, and what was its impact on the viewer?” Due to their inherent complexity, high cost and somewhat limited technology, large advanced multimedia outdoor electronic displays have until recently been on limited display, that is outside of ballparks, and Las Vegas Resorts. Until recently, most of what is ‘seen’ in the form of advanced electronic media and advertising comes into view in our homes on our TVs and PCs. No longer, as very large outdoor electronic displays and outdoor media centers are becoming part of the landscape in the greater public outdoor scene of big city centers. See it, desire it and buy it — that’s the ticket! As a consequence the magic of giant outdoor electronic displays and their promise is gaining momentum and public places may in this sense never be the same again. If you’ve missed it, go to Times Square, New York, or better still go view the entry portal to the fabulous Fashion Show Mall in Las Vegas. Wow, now that is amazing!

As sci-fi imagination often precedes evolving reality, Ridley Scott’s movie *Blade Runner* and Spielberg’s film *Minority Report*, each from the mind of author Phillip K. Dick, offer up striking

visions of the future of outdoor media. This is a future that in some ways is already almost upon us. In the movie *Blade Runner*, a scene of Los Angeles in the year 2019 is presented in the form of a kind of post apocalyptic Tokyo of global warming, driving rainfall and other nightmares. Herein, psychopathic genetically engineered humanoids prowl dangerous streets while the Blade Runner, Harrison Ford, is in hot and deadly pursuit. Of interest to us here are

“Advertisers are more concerned with: “What advertising was in view, and when, how and by whom was it seen, and what was its impact on the viewer?”

the numerous colossal outdoor electronic video billboards on buildings and flying dirigibles with giant talking heads touting myriads of products and services. In the 2054 scene of Washington DC in the movie *Minority Report*, high-resolution outdoor displays are also everywhere in view. As the story goes, crime prevention Police Chief John Anderton is constantly and dangerously on the run, yet he cannot escape the giant outdoor video displays that interact with him everywhere. You see, these advanced two-way machines employ such things as retinal scanners to ID him as he goes and then conjure up a series of individualized in-context video ads targeted to his desires. So wherever he goes, to the metro station, down the virtual reality midway and to a GAP store at the mall, highly personalized messages that are mindful of his past buying habits pursue him. Then, and coming soon,

such outdoor electronic displays employing powerful electronic media engines will reach out and capture a sentient audience.

Today's static outdoor billboards, in-store pop-ups and shelf-talkers and other out-of-home print-based advertising will in time give way to these new forms of far more sophisticated video presentation. This will drive new advertising revenue models and offer up powerful alternate ways to reach an already media-saturated consumer. The out-of-home video world will soon begin to replace a portion of what is rapidly becoming ineffective TV spot advertising, rendered impotent by TV time-shifting in the form of such technical marvels as TiVo and VOD. As it does, advanced advertising on outdoor displays and in commercial sites will win over many of the TV advertising mega dollars now being lost.

While the various forms of out-of-home media are still mostly static with content that is only renewed infrequently in a costly 'manual' way, this approach will gradually be replaced with dynamic targeted, networked media. You can in fact begin to see the transformation taking shape from coast to coast. Electronic billboards formerly limited to such exotic sites as Times Square and Las Vegas are now popping up along many a roadside and in city centers.

Technology as usual is the driver behind much of this evolution, or progress if you see it that way. Declining costs for very large electronic video screens of all types from plasma to LCD in standard and high-definition are

already making a major appearance. When combined with massive yet economic digital storage and lots of bandwidth, the ability to incorporate special purpose broadcast networks — in a cost effective manner — with giant outdoor displays will truly be in play. In fact the entire media-sphere is in full flux again as it is being extended from the living room and the study out to the everywhere. The bottleneck to rapid progress is mainly caused by the hysteresis of rapid change in commercial and technical systems, that is, the energy loss caused by the disruption of changing the way one advertises business.

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As to specific display systems, Barco, Sony and Phillips now provide large screens with digital signage capability attached. Via the embedded IP capable computers in these systems, the content in view is constantly monitored, updated and

controlled with lots of cyber power to do the job. For example, Barco's Solaris LC40-40 includes an onboard Pentium III 1.26 MHZ CPU with 512MB RAM and an internal 40GB drive to power its system. A 10/100 Ethernet port provides wired network connectivity for this system while a PCMCIA slot makes wireless functionality an additional capability. Not to be left out of any new media mega-trend, the Microsoft 'Studio' Division has already weighed-in with its Windows Media based Live Playback System to drive such machines. This contains a scheduler and an automated playout system that uses time codes and IP based XML controls. God forbid we should have a major electronic industry that is not in the clammy grip of big brother Bill 'I already own you' Gates.

Where are the President Teddy Roosevelt and his Rough Riders of today when a nation needs them to stomp on the likes of a present day Henry Ford named Gates? John McCain, can you hear us? Forget about misdirection in Iraq and performance enhancing drugs in sports — it is in new media that the message and the nation is to be won or lost.

Overall, to what good or ill purposes will all these new display and broadcast variants be put as they are sure to change our lives in unpredictable ways? Today out-of-home video signage is already becoming somewhat commonplace, from 9-inch LCD displays in gas stations to 50-inch 16:9 Plasma wide-screens at airports and nightclubs. In-store videos are becoming the de-rigor elements of advanced merchandising. High-end, trend chasing mall specialty boutiques like the Banana Republic, Tiffany, Armani Exchange, Steve Madden, Bebe, and Abercrombie & Finch are all participating. Their in-store videos show the flashy lifestyle of the young and affluent, as lithe runway models strut their 'stuff' to conjure the mood of an alluring lifestyle. Also always on display is more than a touch of sex, to such a degree that at times it is in class with the adult movie trailers of an HBO or Showtime. Also included to help set the buying mood is carefully programmed music that evokes the desired mood to give one a further sense that the good life is here at last, even for you. Is this the good purpose of advanced media?

Michael K, that trendy Soho, NY retailer, has a 22,000 square foot retail space in the lower part of Manhattan that can and

does double as a new kind of nightclub. Disk Jockeys spin their magic for a trendy public with assistance from numerous 42-inch plasma screens fed by an 80 Gigabyte iMerge music server and a \$300K IP based LED lighting system and a 64-source video system feeding 200 monitors and displays including a ballroom sized drop-down projection system. Individual vendors and merchandisers can dial-up its servers to upload their commercial videos into this 'retail' space. New media it is for sure, where large video displays serve a major role in creating a new retail merchandising experience. Will it work? Is this the trend of the future? No one knows for sure, but the train is indeed on the track, and there are many video displays in the mix.

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Today the mother of all such multi-media retail environments is the gateway at the two million square foot (52 acres) Fashion Show Mall in the heart of the Las Vegas Strip. As a part of its billion dollar renovation, the developers created an acre-and-a-half outdoor 'Plaza', which is a world-class attraction on its own. There, some 128 feet above the gateway is mounted a massive, heliotropically tilted 'Cloud' the size of an athletic field (over 500 ft. long). Its four 43 foot by 23 foot ultra bright Barco LED screens make up what is surely the largest outdoor video system in the world. Further, the screens can independently travel on a 385-foot rolling track. Inside the mall the experience continues as 11 vertically oriented 50-inch plasma displays offer up dining, shopping and entertainment directions and a guide to this mall. Also on display are three giant

LCD screens that adorn an 800-foot long 'Great Hall' where fashion shows are held daily and multimedia is the experience. This all goes far beyond the concept of shopping mall to the idea of a consumer attraction of major proportions that includes shopping, dining and merchandizing. Tying together all the technology that makes all these advanced systems work is a multi-million dollar Show Control Hub powered by customized Dalet Digital Media Systems software. All in all, even for Las Vegas you have to see it to believe it. Will this approach drive a greater commercial success? Apparently some big money players are willing to find out.

Software is the key to a world of out-of-home media technology that is more like the personalized systems of *Minority Report*, and less like the giant one-way screens of *Blade Runner*. These more personalized systems may be less annoying, more useful and more effective for branding and advertising. The real potential for networked out-of-home multimedia in the future is the ability to display localized targeted advertising that can be shown in the right place at the right time to the right audience. Such an approach requires massive databases, advanced input output devices and very sophisticated software to make them work. This will not be easy, but it will happen.

In our example of the Las Vegas Fashion Show Mall, the folks at LaValle and Associates consulted with the owners, the Rouse Company, to bring it all together

as a practical coherent consumer experience with a balanced schedule. Prior programming work for the likes of Disney and DirecTV was useful in determining what should go on each screen by genre, season, merchandizing trend, show in town, date and time and the like. Yet innovation and risk-taking remain the order of the day to test out what works best. Clearly it is still early days and much remains to be learned about how to make giant outdoors commercial displays work effectively in ways that attract an audience and impact its behavior.

"These more personalized systems may be less annoying, more useful and more effective for branding and advertising."

Yet we can imagine a big retailer like a Rouse Company, operator of the Las Vegas Fashion Show and over 30 other regional malls, integrating its entire merchandising effort via a single media network of its

own. Embedded in its localized programming 'wheels' can even be ads and messages from other local or regional businesses that are outside the confines of the malls. In this sense, the network is indeed the system and the system is about presenting in-your-face high-tech multimedia displayed images that capture the eye of the consumer and trigger a need and perhaps a buy. That is to say that the large out-of-the-home displays need not be stand-alone sentinels. Instead, when brought together within a comprehensive networked system, they can work with far greater effectiveness to achieve a set of common purposes.

Indeed specialty software vendors are addressing these emerging needs. Take the E Signs product from longtime

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(Will return next month)

broadcast graphics vendor Inscribe. It is designed to run digitally networked signage; sending customized, scheduled messages and graphics to any IP connected display anywhere. Retail chains are taking note from Best Buy to Home Depot.

This approach can become key to merchandising in America as shopping in malls is where it truly is at today for the greater population. According to the International Council of Shopping Centers, there are about 1,182 large enclosed regional malls in the US. Over 200 million adults visit American malls including strip malls each month! Over 20 million are projected to visit The Fashion Show in Las Vegas in 2006. The average visit is well over one hour. According to one inside source Wal-Mart's collectively host over a hundred million visits per week. We guess it is all about 'shop until you drop' and the electronic media is now a big part of the experience with large displays an important part of the solution.

Of course there are other out-of-the-home venues as well that warrant similar attention. For example, Sadge Media and Signcast are two companies that lead the way in terms of independent electronic narrow-casted out-of-home networks to selected populations. The Campus Vision

networked system of Sadge Media system is said to already reach some 340,000 students on 14 campuses in eight states today. These folks predict that by 2005 they may have as many as 15-percent of the 15 million college/university student population in the US on their network. That is a key demographic sector to all merchandisers and advertisers that

represents a big part of their future; it is also a population that has some \$200 billion of discretionary buying power today. The Campus Vision system works on a 15-minute video cycle that includes ten minutes of relevant news and

entertainment for a college audience along with some five minutes of targeted advertising.

More avant-garde still is a venture backed by an advertising conglomerate made up of IPG, Time-Warner and Samsung working with Signcast. Signcast has a networked media system that is tailored to the tastes of the 18-34 year old nightclub and bar crowd. Via a 30-minute video loop it presents them with entertainment consisting of sexy short pieces intermixed with equally sexy advertising focused on HBO content plus beer and liquor ads. The cabaret owner earns a modest monthly fee from Signcast for placing its 50-inch Samsung plasma display on its premise. The system also contains an ISDN line and a media server to refresh the 30-minute

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'video billboards' on a regular basis. Signcast now has its eye on casinos, gyms, health spas, salons, bowling alleys, cafes, restaurants and the like as a direction in which to spread its dominion. They even claim they can customize the content to the individual venue and thereby make it more valuable to one and all. Signcast also touts an interactive feature wherein mobile phone users can enter free electronic advertising 'coupons' into their handsets to enable and transact special commercial offers in real-time.

The bad news in all of this is that location based out-of-home electronic advertising and media may add up to an overwhelming amount of annoying visual pollution that triggers further consumer immunity to electronic media — especially advertising. To be effective, the messaging must hit the sweet spots on the Inform-Shock-Entertain continuum that represents a mix the viewer or consumer prefers, whilst at the same time providing contextually relevant messages.

Musak is one such successful example of networked place-based digital media. They can indeed customize their media offering down to the individual store level of a retail chain or commercial house.

This is an approach that will work — in-context, targeted, highly localized messaging delicately balanced with national campaigns and other forms of programming. Consumers are tired of irrelevant and distracting eye pollution. Site-based advertising is a unique

opportunity to reach the consumer where and when they are and where and when they are most likely to respond. Retailers, real-estate developers and managers, and creative digital network programmers can develop new sources of revenues by selling highly localized advertising, and national advertising to highly localized audiences within such systems. The opportunity exists to remake the traditional outdoor advertising industry, which has been slow to realize that Phillip K. Dick's vision is near, sans Replicants and Retinal Scanners for the moment. These possibilities are in many ways shocking and appealing, and the future as always is disruptive. Who knows some may say. The Shadow do, and soon so will you.

"Consumers are tired of irrelevant and distracting eye pollution. Site-based advertising is a unique opportunity to reach the consumer where and when they are..."

(Leo Willner, Stuart Volkow and Greg Kalsow contributed to this issue. In order to discuss any of these points with the authors, please e-mail them at: leo@ad-assoc.com, stuart@ad-assoc.com and greg@ad-assoc.com)

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