OVERVIEW AND STUDY BACKGROUND

"The medium is the message."
Marshall McLuhan

1.1. INTRODUCTION

Out-of-home (OOH) advertising media – in its original and ancient form of some type of message displayed outdoors to communicate a message to the broad public – is the oldest mass medium and can be traced back in history to a few thousand years BC. Wall or rock painting for commercial advertising is one of the oldest forms of ancient outdoor messages; and it can still be found to this day in many parts of Asia, Africa and South America. This tradition of painting walls or rocks with commercial messages can be traced to Indian rock art paintings that date back to 4000 BC (Bathia in Surhone & Timpledon, 2010:5).

Outdoor messages in the form of inscriptions on Egyptians monuments or papyrus with political and commercial messages comprise another form in the long history of this medium. Outdoor messages on papyrus of lost and found goods were common practice in ancient civilisations; and such messages may still be seen on display in the Louvre on papyrus dated to 146 BC – with a message offering a reward for two escaped slaves from Alexandria. Commercial messages and political campaign displays have been found in the ruins of Pompeii and ancient Arabia. There were also proclamations on tablets on walls in ancient Greece and Rome, as well as signs with symbols – such as a goat for dairy products – or a bush for a tavern in Greece (Bernstein, 2005:12).

Alternative forms of early OOH advertising in Europe also include royal and government decrees announced by town criers during the second half of the 12th century, promotional handbills during the second half of the 15th century, and early versions of theatrical posters in the late 17th century (Brioschi in Gambetti, 2010:17).

Not surprisingly, the OOH advertising media have changed and developed over time; and the shapes and formats of this medium have continued to evolve even more during the past century. Until relatively recently, the OOH advertising media have consisted primarily of outdoor advertising or billboards; but these have expanded to currently include some alternative OOH advertising media platforms, such as transit advertising media (Duncan, 2005:376; Lane, King & Reichert, 2011:359; Moriarty, Mitchell & Wells, 2012:367; O'Guinn, Allen & Semenik, 2000:507; Shimp, 2010:585, Sissors & Baron, 2010:263:267; Yeshin, 2006:238) and street and retail furniture advertising media (Shimp, 2010:586).

Even more recently various other options have also been introduced to include a variety of digital- and ambient OOH advertising media such as advertising messages displayed on goods used or displayed in public places, blue-tooth posters, touch-screen interactive panels and unconventional promotional initiatives that involve people or employ urban guerrilla techniques (Gambetti, 2010:34; Shimp, 2010:580; Moriarty *et al.*, 2012:365).

The implication for marketers is that OOH advertising media is no longer restricted to outdoor advertising alone – in the roadside environment aimed at broad-based vehicular traffic – but has now expanded to several other environments, which allow for a far more targeted reach of a variety of target markets – comprising commuters, pedestrians, shoppers and other hard-to-reach targets, where they are engaged in specialised activities.

These OOH environments range from transit environments, such as those at airports (Wilson & Till, 2008:59); public transport routes and waiting areas (Veloutsou & O'Donnell, 2005:217; Eun & Kim, 2009:99), minibus taxi ranks and commuter routes (Du Plooy & Du Plessis, 2011:757) to the retail and leisure environments, such as those at cultural events (Berneman & Kasparian, 2003:40) and sport arenas (Turley & Shannon, 2000:323), together with a variety of other specific places, such as at golf courses, shopping malls, outdoor squares, festivals and events, access routes to shopping malls and stores, health clubs, beaches, schools, public restrooms, doctors waiting rooms, sports stadia and arenas (Gambetti, 2010:36; Lane *et al.,* 2011:374; Sissors & Baron, 2010:269).

There has thus been a significant change over the last decade in the quantity and form of OOH advertising media. In many countries, the spending on OOH advertising has grown. In the United Kingdom, this is the fastest growing "traditional" advertising medium, with a growing share of the total advertising expenditure of between 4.5% and 5.5% between 2000 and 2007; while in China, there has been an average growth of 26% per annum between 1990 and 2003, rendering this medium the third largest advertising medium behind television and newspapers (Iveson, 2012:15).

A total of approximately $6.388 billion (R50.03 billion) was spent on OOH advertising media in the USA in 2011. This amount has grown by almost one billion dollars over the past decade (OAAA[1], 2012). OOH advertising media also form a significant part of the overall share of advertising expenditure in other countries, such as Russia with 17.7%, China and Japan with approximately 14%, and more than 10% in France and Greece (Iveson, 2012:15). The drastic increase in the popularity of OOH advertising media in Russia, since their inclusion in the free-market system, is remarkable. In particular, large outdoor advertising formats are being encouraged, because these are regarded as an indication of prosperity in this country (Lopez-Pumarejo & Myles, 2009:35).

The total global OOH advertising expenditure has generated total revenues of US $26.3 billion (R198.61 billion) in 2011 – up by 6.4% from the previous year. This sector is expected to grow at a faster pace than advertising overall; and it is predicted to reach US$38,6 billion (R291.49 billion) in 2016 (Magna Global, 2011:24). The OOH advertising media sector will continue to grow and diversify over the next decades, not only because of its cost-effectiveness, but also because it seems to be the only available realm from which to reach progressively elusive consumers, and the ideal anchor of integrated marketing communication (IMC) campaigns (Lopez-Pumarejo & Myles, 2009:38).

Not only have the attractiveness of OOH advertising media increased globally, but they has also entered the digital era. Globally, digital OOH advertising is the fasting growing of all OOH advertising media types; and it is expected to grow even faster. Digital OOH advertising media are consequently predicted to almost double in size – from $2.6 billion (R19.63 billion) in 2011 to $5.2 billion (R39.27 billion) in 2016

(Magna Global, 2011:24). Digital OOH advertising is growing mainly as a result of the growth in wireless and broadband Internet access – making it more efficient for content and advertising delivery. This new medium brings with it flexibility in terms of time-of-day targeting or altering creative content. It can be used in new environments, such as in-store environments, as well as in rural areas, much more cheaply than ever before. It allows for interaction via cell-phone devices, especially with short code messages (SMS) and QR (Quick Response) codes, which have made this medium even more engaging for consumers, while allowing advertisers to provide relevant content, instead of just one-way static advertising messages (Lane *et al.,* 2011:376).

The rapid expansion of OOH advertising internationally is, however, not reflected in the current state of the advertising and media industry in South Africa. In South Africa, OOH advertising media seem not to be reaching their full potential. The relative share of OOH advertising media is far less than that for other major media types. Television advertising still remains the medium with the largest amount spent: R14 572.1 million (46.1%), followed by print advertising with R9 929.3 million (31.4%) for 2011. The relative share spent on OOH advertising media is much smaller and remained rather stable for a decade, with very little growth in the market share from 3,9% (R362,9 million) of the total amount spent on media in 2000, 4,4% (R1075,1 million) in 2009, 4.3% (R1200.6 million) in 2010 and 4,2 (R1328,9 million) in 2011 (OMD, 2011:16; AC Nielsen Media Research in The Media shop, 2011).

The growth in the relative market share of OOH advertising media in South Africa between 2007 and 2010 has comprised a modest 5.6%, with an accompanying decline in the OOH advertising media share of the total advertising investment from 4.95% to 4.24%. OOH advertising media are therefore referred to as the 'Cinderella media' in South Africa, due to the untapped potential (Patterson, 2011).

OOH advertising media, as the oldest mass advertising media, have also not received the attention they deserve in the South African or international literature. Limited studies in this area have been published during the past decade (Berneman & Kasparian, 2003; Du Plooy and Du Plessis, 2011; Eun & Kim, 2009; Iveson, 2012; Lichtenthal, Yadav & Donthu, 2006; Nagel & Louw, 2004; Osborne & Coleman,

2008; Pauwels; 2005; Van Meurs & Aristoff, 2009; Veloutsou & O'Donnell, 2005; Taylor & Franke, 2003; Taylor, Franke & Bang, 2006, Wilson & Till, 2008; Wilson & Till, 2011).

These studies have mainly focused on the freestanding outdoor advertising signs or billboards (Taylor & Franke, 2003; Nagel & Louw, 2004; Pauwels, 2005, Taylor *et al.*, 2006, Wilson & Till, 2011), outdoor posters (Berneman & Kasparian, 2003; Van Meurs & Aristoff, 2009), and more recently the outdoor media landscape and urban governance (Iveson, 2012). None of the published studies have investigated the planning and integration of different OOH advertising media platforms.

From the above discussion it is clear that the planning and integration of different OOH advertising media platforms has not been explored before. Furthermore paramount to IMC is the benefits of harnessing synergy across multiple media, an area of research that is strongly supported (Ewing, 2009:104; Grove, Carlson & Dorsch, 2007:39; Kitchen & Schultz, 2009:201; Naik & Raman, 2003:375; Schultz, Block & Raman, 2009:4; Schultz, 2006:14; Schultz, 2006:14; Voorveld, 2011:2201; Voorveld, Neijens & Smit, 2010:69)

Multiple media synergy is just one of the levels of IMC implementation. IMC can be explored and implemented on different levels. Kitchen and Schultz (2001:108) distinguish between four-levels of IMC implementation by companies. The first level is co-ordination of IMC on a tactical level, on the second level marketing communications is expanded to include all contact points that a customer or prospect could have with the company; the third level entails the use of new technologies to increase the information flow between employees, distributors and suppliers. The fourth level deals with the implementation of IMC on a strategic level. When using these four levels as a guide for this study, its focus will be on studying IMC effects from a more tactical point-of-view, by exploring the planning and integration of OOH advertising media platforms on campaign level from a media planning perspective.

The past decade a number of studies have investigated the implementation of IMC on this more tactical level by examining the synergy when combining marketing

communication techniques such as cinema and television advertising media (Ewing, Du Plessis & Foster, 2001), television and print advertising (Du Plessis, 2005; Naik & Raman, 2003); television- and web advertising media (Chang & Thorson, 2004) online print- and television advertising media (Lynn, 2006) television advertising media and print program promotions (Tang, Newton & Wang, 2007) and combining online and radio advertising (Voorveld, 2010).

Some studies have even included synergy in the context of OOH advertising media, such as combining outdoor- and newspaper advertising (Donthu & Bhargava, 1999) or minibus taxi advertising with radio and magazine advertising (Du Plooy & Du Plessis, 2011). However the potential synergy when combining different OOH advertising media platforms has not been explored before. Therefore the focus of this study is specifically on the integration of different OOH advertising media platforms and not on IMC in general or on the other potential levels of IMC implementation.

Some might argue that such a focus might be to too narrow by only focussing on a tactical level. However there is a precedent in the literature to suggest that such a focus has considerable value. Naik and Raman (2003:375) note that despite synergy's importance role in IMC it is still not well understood. According to Ewing (2009:113) synergistic integration is an intuitively appealing concept that is still not universally well understood or implemented. He strongly encourages descriptive, prescriptive and explanatory research on the implementation thereof. In a similar note Schultz *et al.* (2009:7) suggest that there seem to be a very bright future for studies of synergy in media.

Kitchen and Schultz (2009:210) argue that perhaps "the most critical issue in the on-going development of IMC is how the brand communicator can understand, explain or manage the perceived synergy between various communication alternatives. Understanding how various communications activities work together or in combination is one of the most critical issues facing IMC today". One of these alternatives is the synergy when integrating different types of OOH advertising media in a campaign.

In the light of the above discussion the focus of this study seeks to answer the following research question:

How do experienced OOH advertising media specialists plan and integrate different OOH advertising media platforms in the South African context?

The problem statement will now be discussed. This will be followed by the research objectives, the research methodology, the importance and benefits of the study, the scope of the research and the definitions of key terms. The chapter will then conclude with a discussion on the structure of the chapters to follow.

1.2. PROBLEM STATEMENT

Over the past few years there has been a significant growth in support media due to an increasing concern about consumers' ability to avoid advertising. This avoidance behaviour has had the opposite effect, with advertisements appearing in places that were not previously considered conducive to these advertising messages. Several titles, such as alternative media, non-measured media and non-traditional media are used to describe the wide variety of channels now used to deliver communications. OOH advertising media are often considered to be part of these alternative support media, due to the fact that they can reach people in the target market who were not reached effectively by primary above the-line-media, such as mass broadcast and print media. OOH advertising media encompass many advertising forms, including billboards, street furniture advertising, alternative media (like aerial advertising, mobile billboards, and in-store media, such as in-store ads, shopping cart signage, in-store TV) and transit advertising (Belch & Belch, 2012:447).

In South Africa, there are still some major challenges that hinder OOH advertising media from reaching their full potential. One is the lack of understanding of OOH advertising media and their potential as advertising media for the South African market. De Charmoy (2012) convincingly argues that the lack of research on the effectiveness of the whole range of OOH advertising media platforms, and the absence of a reliable industry tool for planning and measuring OOH audiences

across platforms, are the major obstacles hampering the growth of this sector in South Africa.

Another challenge is that large advertisers tend to rely mostly on outdoor advertising or billboards, despite the growing number of alternative options in the OOH advertising media landscape in South Africa. According to Du Preez (2007), non-traditional outdoor advertising formats – such as transit advertising and minibus taxi advertising, in particular, are currently underutilised OOH advertising media platforms. Transit advertising might thus be the one medium that could offer a successful solution to the increasingly cluttered outdoor advertising space.

There also seems to be a lack of market orientation by the industry in general – thereby, preventing their growth. According to Patterson (2011), in order to grow the OOH advertising media share and to realise its full potential in South Africa, this industry has to become more marketing-oriented, and start following a less production-reliant approach. OOH media companies should begin to offer OOH advertising media solutions that are just as flexible and creative as their overseas counterparts. Media agencies, media companies and advertisers, need to understand and consider all the OOH advertising media options objectively, in order to apply these media more effectively.

Despite the long history of OOH advertising media, their international growth and increasing attractiveness, this channel has received relatively little attention in the academic literature. Most published studies, until recently, have focused only on outdoor advertising (Bhargava, Donthu & Caron, 1994:64; Bhargava, Donthu & Caron, 1994; Donthu, Cherian & Bhargava, 1993; Wilson & Till, 2011). This is only one of the platforms of OOH advertising media. Only during the past decade, have some studies on other platforms been published, such as street and retail furniture advertising (Berneman & Kasparian, 2003; Van Meurs & Aristoff, 2009); transit advertising media; (Veloutsou & O'Donnell, 2005; Wilson & Till, 2008) and digital OOH advertising media (Eun & Kim, 2009; Turley & Shannon, 2000).

Despite the wide variety and potential role of OOH advertising media in South Africa, academic research on OOH advertising media is scant and seems to be limited to a

few types of OOH advertising media formats. Nagel and Louw (2004) explored the response of black South Africans to outdoor advertising in Limpopo, a semi-urban rural area. Pauwels (2005) explored the use of posters and outdoor advertising to communicate TB – and HIV/AIDS-related messages – to the public health sector; while Du Plooy and Du Plessis (2011) measured the effectiveness of minibus taxi advertising in South Africa.

Prominent textbooks on media and IMC have started to reflect the fact that OOH media comprise more than just outdoor advertising, but rather consist of a variety of platforms and formats. Some sources include transit advertising media when reviewing OOH advertising media (Belch & Belch, 2012:453; Duncan, 2005:376; Lane *et al*., 2011:359; O' Guinn *et al*., 2000: 507; Shimp, 2010:585; Sissors & Baron; 2010:441-421; Moriarty *et al*., 2012:367; Yeshin, 2006:328). Others might even refer to street and retail furniture advertising media in their discussions (Duncan, 2005:376; Shimp, 2010:586).

Only a few seem to realise that just like other media, OOH advertising media are now entering the digital era. Only very recently have some recognised sources on advertising media planning, such as Belch and Belch (2012:449), Sissors and Baron (2010:441) and Lane *et al*. (2011:359) started to include some digital formats, such as digital video screens that appear in places like offices, stores, bars, gymnasiums and digital screens, which transmit in LED (Light Emitting Diodes) or LCD (Liquid-Crystal Display) technologies in the context of OOH advertising media.

In spite of the inclusion of a wider variety, a number of the recent IMC and advertising textbooks still seem to assume that this diverse range of platforms and formats share exactly the same key characteristics, benefits and limitations; and they consequently treat OOH advertising media as a homogeneous sector (Moriarty *et al*., 2012:369; Katz, 2010:91, Lane *et al.,* 2011:359). Failure to consider the uniqueness of these platforms has resulted in the synergy that could result from combining these platforms, also being neglected. The application thereof has also been described as if OOH advertising media were just the same as outdoor advertising, which is mainly effective when used as a broad-based mass medium aimed at vehicular traffic,

rather than as a highly flexible and targetable medium, suitable for particular geographical areas or able to reach very specific market segments.

The proliferation of OOH advertising media types available to target specific consumers segments in a variety of environments, the limited research on the whole range of OOH advertising media platforms – specifically from a South African perspective – and all the apparent obstacles in the South African context, emphasise the need for a clear understanding of the changing nature of OOH advertising media, and the issues to be considered when planning an integrated OOH advertising media campaign in a developing country, such as South Africa.

The planning of an integrated OOH advertising media campaign, as part of an overall IMC plan, is a complex process; and it involves a number of strategic and operational considerations. Advertisers depend on the advice of OOH advertising media strategists or -planners in agencies, with regard to decisions on whether or not OOH advertising should be used; and if so, then how often; which geographic areas or specific locations; which types of OOH advertising media platforms and formats; and how these media should be integrated into their overall marketing communication strategy.

Given the above context, the problem statement is summarised as follows:

The integration of different kinds of OOH advertising media per se, is seldom considered to be an integral part of the decisions when planning OOH advertising media as part of an overall IMC plan. Very little has been published in academic journals and textbooks on how OOH advertising media planning across platforms should actually be done – even more so in a developing country, such as South Africa. Hardly any studies have addressed the integration of OOH advertising media platforms; and no framework exists for the planning and integration of OOH advertising media in South Africa. Despite synergy's important role in IMC it is still not well understood and researched in the context of OOH advertising media. It is therefore necessary to investigate this further, in order to propose a framework for the planning and integration of OOH advertising media in South Africa.

1.2.1 RESEARCH AIM

The aim of the current study is to explore how experienced OOH advertising media specialists are planning and integrating different OOH advertising media platforms as part of an overall campaign. These insights, together with an extensive investigation into the relevant literature, will be used to develop a framework for the planning and integration of OOH advertising media in South Africa.

The specific research objectives of the study are as follows:

1. To discuss marketing, marketing communication, integrated marketing communication and OOH advertising media from a theoretical perspective, in order to identify and apply the key IMC principles that should guide the planning of OOH advertising media as part of an overall IMC campaign;
2. To describe the general advertising media planning process and principles from an IMC perspective;
3. To categorise OOH advertising media types in South Africa;
4. To explore the planning and integration of OOH advertising media by OOH specialists in South-Africa, as part of an overall IMC campaign.

The next section will explain the importance of the study and the delimitations that apply to the proposed study. This is followed by a list of definitions of the key terms used in the study.

1.3. THE IMPORTANCE AND BENEFITS OF THE STUDY

OOH advertising media planning and integration constitute a complex decision-making process, involving strategic, as well tactical considerations. This requires collaboration between a number of different role-players, such as advertisers, advertising agencies, media agencies and media companies. The relevant theory on OOH advertising media is inadequate and highly fragmented; and the proposed study will, consequently, make valuable contributions to the extant body of

knowledge – by developing a framework for the planning and integration of the whole range of OOH advertising media platforms for South Africa.

Thus the proposed framework should not only be applicable when planning outdoor advertising; but it should also extend this applicability to other OOH advertising media platforms, such as street and retail furniture advertising media, transit, advertising media, as well as a variety of other OOH advertising media.

Understanding how different IMC elements and media work together, or in combination to achieve synergy, is one the most critical issues facing IMC today. Therefore, this study should also be valuable from an IMC perspective; because it will not follow a fragmented approach that only focuses on outdoor advertising media, but ignores the fact that OOH advertising media now comprise a wide range of platforms.

This study proposes a holistic perspective towards the planning and integration of all the major OOH advertising media platforms in South Africa – specifically outdoor advertising media, street and retail furniture advertising media, transit advertising media, as well as alternative OOH advertising media.

As far as the researcher could determine, this is the first academic study on the planning and integration of OOH advertising media in South-Africa, unlike research conducted by practitioners – who tend to focus only on the effectiveness of a specific advertising campaign, and whose studies are often confidential.

The specific value of this study lies in the fact that experts or specialists with extensive experience in planning OOH advertising media for some of the largest advertisers in South Africa were consulted – as a basis for developing the framework – and not just media planners or buyers who would deal with the more tactical planning aspects of an OOH advertising media campaign. The OOH advertising media specialist agencies (Posterscope, Kinetics Worldwide, Intouchoutdoor and Outdoor exchange) and media-only agencies with OOH advertising media divisions (The Mediashop and Mediacom) included in this study are prominent players.

Amongst their clients are Coca Cola, Adidas, Visa, Vodacom, Sony, Virgin Active, Pantene, Shoprite, Unilever, Nedbank, Brandhouse, KFC, ABSA, Cadbury, Pfizer, Kulula airlines, NuMetro, Eskom, Spar, Green Cross, Standard Bank and Cell C.

The qualitative research approach for the current study facilitated an in-depth understanding of the complex multi-faceted planning and integration process of OOH advertising media, as part of an overall IMC strategy. The qualitative interviews with the specialists allowed them to express their ideas and experiences on the process of planning, as well as their relationship and interaction with other role-players, such as advertisers, advertising or media agencies, OOH media owners and research providers.

1.4. THE SCOPE OF THE RESEARCH

The following aspects should be taken into account when reviewing the demarcation of this study:

- The marketing mix consists of four elements: product, place, price and promotion or marketing communication. Marketing communication, the nucleus of marketing and branding, was used as the basis from within which OOH advertising as a medium was explored. This study focussed specifically on OOH advertising media, which is just one of the potential advertising media that can be employed in a campaign.

- The focus of the study is on four major OOH advertising media platforms, especially outdoor advertising media, street and retail furniture advertising media, transit advertising media and alternative OOH advertising media. However, other IMC elements, such as sales promotion and cinemas, considered by some as part of OOH advertising media as support media, are not included in this study.

- The purpose of this study is to explore how specialists conduct OOH advertising planning; and then to develop a framework to be used as a guideline by academics, advertisers, OOH strategists and OOH media companies – not to develop any statistical model.

- The data were collected from in-depth interviews with OOH advertising media specialists in media companies in South Africa.

- The process and principles of planning and integration of an OOH advertising media campaign are the main concerns of this study – and not the overall IMC strategy of companies or any attempt to propose solutions to all potential obstacles or problems when planning an integrated OOH advertising media campaign.

- The study has a broad or general focus in terms of how OOH media advertising media are applied across industry sectors, product or service types and market segments; and it does not attempt to determine the difference between these sectors, or product types, or different types of consumers. In other words, the purpose is not to explore how OOH media advertising media application and planning might differ between industries (for example in the financial industry, the retail industry and the telecommunications industry). Nor was the purpose to explore how the planning would differ between product types, such as luxury products, staple goods, convenience products or services, or even different market segments.

1.5. DEFINITIONS OF KEY TERMS

The key concepts involved in this study are: ambient OOH advertising media; digital OOH advertising media; integrated marketing communication; media planning, media plan; OOH advertising media; OOH advertising media types; outdoor advertising media; street and retail furniture advertising media as well as transit advertising media.

The manner in which these key terms are defined for the purpose of the study is considered below:

- *Ambient OOH advertising media* comprise all unconventional forms of OOH advertising media that employ alternative and unconventional media in unexpected environments, in order to transmit the message (Jurca, 2010:327), such as advertising on balloons, bicycles, clothing, tee-markers on a golf

course, bills, shopping trolleys, promotional street art, graphic-pictorial advertising like graffiti and chalk stencils and interactive promotional events (Gambetti, 2010: 34).

- *Digital OOH advertising media i*s similar to traditional outdoor advertising signs, but it does not use static printed images; but instead, it uses digital technology to create an image, such as digital signage, display videos or electronic images on LCD, plasma, or standard television outside the home (Moriarty *et al*., 2012:365). Usually, the screens show advertising, product information, or special programmes. For the purpose of this study, screens that show only textual information or full-length network or cable television programmes, without any commercial content or advertising messages, were not included.

- *Integrated Marketing Communication* as applied to this study is defined as a communication process that entails the planning, integration and implementation of a variety of marketing communication elements, and specifically OOH advertising media types, that are delivered to targeted customers and prospects (Shimp, 2010:11).

- *Media planning* refers to the series of decisions made to deliver advertising messages to the appropriate people, the right number of times, in the right environment, at minimum cost, to achieve the advertised brands' marketing communication objectives (Koekemoer, 2005:201).

- *A media plan* is the complete analysis and execution of the media component of an advertising plan (Lane *et al.*, 2011:224).

- *OOH advertising media* include the whole range of advertising media platforms intended to reach consumers outside their homes (hence the name), in contrast to other media, such as television, magazines and radio, which are typically received inside the home (Shimp, 2010:578). For the purpose of this study, OOH advertising media include four major platforms: specifically outdoor advertising media; street and retail furniture advertising media; transit advertising media and alternative OOH advertising media.

- *Outdoor advertising media* as one of the major platforms of OOH advertising media in South Africa, consist of advertisements on larger format free-standing displays, next to the road and on buildings, walls and other constructions, typically used to reach travellers in vehicular traffic (OHMSA, 2012[1]).

- *OOH advertising media types* were used as a generic term when referring to the combination of formats and vehicles in general.

- *Street and retail furniture advertising* comprises smaller OOH media formats in urban or residential areas that usually provide public amenities in the form of functional fixtures or equipment (SAMOAC, 2008:21); and this type of advertising is positioned at close proximity to pedestrians for eye-level viewing, or at the pavements to impact slow-moving vehicular traffic. Street furniture displays include, but are not limited to, street-pole advertisements, advertising on rubbish bins, telephone booths, bus shelters, or benches, or even advertising in kiosks at minibus taxi ranks. Retail furniture advertising includes a wide variety of vehicles, ranging from advertising inside shopping malls or shopping areas, such as in the bathrooms, on escalators or lifts, or hanging banners to advertising in parking areas or on parking booms.

- *Transit advertising media* refer to stationary advertising positioned in the common areas of transit such as stations, taxi ranks, terminals and airports, as well as moving transit advertising displays fixed to or inside moving vehicles, trains, buses and taxis. This platform includes advertising on the interiors and exteriors of taxis, minibus taxi, busses, trains, motor vehicles – and even airplanes or boats; and it is used to deliver advertising messages to public transport and minibus taxi commuters (Belch & Belch, 2012:452; Du Plooy & Du Plessis, 2011:775).

The acronyms and abbreviations used in this document are listed in Table 1.1

Table 1.1: List of acronyms and abbreviations used in this document

Abbreviation	Meaning
GRPs	Gross Rating Points
IMC	Integrated Marketing Communication
LSM	Living Standards Measure
LTS	Likelihood To See
MNP	Media Neutral Planning
OAAA	Outdoor Media Association of America
OHMSA	Out -of-home Media Association of South Africa
OMA	Outdoor Media Association of Australia
OMA Ireland	The Outdoor Media Association of Ireland
OMA Canada	Out of Home Marketing Association of Canada
OMANZ	The Outdoor Media Association of New Zealand
OMC	Outdoor Media centre of the United Kingdom
OOH advertising media	Out-of-home advertising media
OTS	Opportunity to See
QR code	Quick Response code
SABINET	South African Bibliography Network
SARF	South African Research Foundation
VAC	Visibility Adjusted Contact

1.6.   RESEARCH METHODOLOGY

The planning and integration of OOH advertising media has been explored in two phases. In phase one, a literature review was conducted to explore the relation between IMC and OOH advertising media and to establish the current state of, advertising media planning and OOH advertising media internationally and in South Africa. This was necessary in order to position the study and it enabled the researcher to determine the nature of the research and its context, and to relate the study to the existing body of knowledge. The review was not only based on the academic literature, but was supplemented with some publications from the international and South African OOH advertising media industry – due to the limited nature of published studies – as well as to present the South African perspective.

This was followed by the empirical phase which consisted of a qualitative exploratory investigation in order to determine how OOH advertising media specialists in South-

Africa conduct the planning and integration of various OOH advertising media platforms, as part of an overall IMC campaign. During this empirical phase, the planning process of participants – from the setting of objectives to an evaluation of the effectiveness thereof – was investigated.

Due to the limited literature on published academic research in this area, the types and characteristics of the data to be collected for this study call for authentic expert information on the topic. Traditional quantitative surveys with pre-determined questions and a limited number of variables being studied were therefore not appropriate. The purpose was not to measure or predict the relationship between variables, but rather to improve the understanding of OOH advertising media planning and integration in the South African context, in order to propose an OOH planning and integration framework for practitioners in this context. This would only have been possible if detailed information could be gathered from prominent specialists in this area in South Africa. Thus an inductive approach to qualitative content analysis (see 5.4.1.2) was selected as research design, so that it could be established in an exploratory way how media specialists in South Africa plan and integrate different OOH advertising media platforms.

Purposive sampling was used to select the advertising media specialists in prominent media-only agencies (the Mediashop and Mediacom) and OOH advertising media-specialist agencies (Posterscope, Kinetics Worldwide, Intouchoutdoor and Outdoor exchange) in South Africa. The participants were selected, based on their wide-ranging experience across all of the OOH advertising media platforms.

The researcher contacted the participants to request their permission to conduct the interviews; however, no incentives were given to encourage the participants to agree to take part in the interviews. Before commencing with the interview, the participants were briefed personally and via email to explain the purpose of the study and to ensure them of the confidentiality of the information provided. The participants were then asked to suggest a convenient time for them to be interviewed personally. The in-depth interviews with the selected participants were recorded and transcribed.

Qualitative content analysis was used in the current study, since the knowledge about the phenomenon being studied is limited and highly fragmented. The data were analysed with help of ATLAS.ti and the insight presented in the form conceptual networks.

The themes were linked to larger theoretical constructs found in the literature. This was used as a basis for developing a framework for the planning and integration of OOH advertising media in South Africa.

1.7. STRUCTURE OF THE CHAPTERS

Chapter one sets the research orientation by providing the background to the research. It presents the research problem, the aim and objectives of the research project, as well as the significance of the study. This is followed by the study demarcation, and the definitions of the key terms used. The chapter concludes with a brief description of the methodology.

Chapter two discusses the relationship between key concepts in the study, specifically: marketing, marketing communication, IMC and OOH advertising media. The conceptualisation of the IMC concept is described, as well as the key principles of IMC applicable to OOH advertising media planning and integration. The chapter is concluded with a discussion of media synergy.

Chapter three discusses the major phases in the planning process of general advertising media from an IMC perspective: Firstly, the alignment of the media plan with the overall IMC and advertising plan, followed by media planning and strategy; and lastly, the evaluation and follow-up.

Chapter four discusses how OOH advertising has evolved from outdoor advertising, to include a wider range of OOH advertising media types. Furthermore, it presents the conceptualisation of OOH advertising media from an academic and advertising and media industry perspective, followed by a classification of OOH advertising media types from a South African perspective. The chapter concludes with a

discussion of published research on each of the major OOH advertising media platforms.

In **Chapter five**, the research methodology is outlined to address the research objectives. The planning and integration of OOH advertising media are explored in two phases. The first phase is the development of a literature framework – to relate the study to the existing body of knowledge; this is followed by a second phase, which entails an exploratory qualitative study – to explore how OOH advertising media is planned and integrated by specialists in media agencies in South Africa.

Chapter six is a presentation of the qualitative research findings of the in-depth interviews. The three theoretical constructs that encapsulate the findings will be discussed in detail – at the hand of conceptual networks, namely: the alignment of the OOH advertising media campaign in the overall IMC plan; the planning of OOH advertising media; and the evaluation and research of OOH advertising media.

Chapter seven compares the findings of the study with the literature; and it presents a proposed framework for the planning and integration of OOH advertising media in South Africa. The limitations of the study, as well as some recommendations for practice and for future research, conclude this thesis.