CHAPTER 4: A GLOBAL AND SOUTH AFRICAN PERSPECTIVE ON OUT-OF-HOME ADVERTISING MEDIA

*"Outdoor is not medium; it is an extra large." (*OAAA[2], 2012*)*

> ***Research objective to be addressed:***
> ***To categorise OOH advertising media in South Africa.***

4.1   INTRODUCTION

In the previous chapter, the major phases and principles in the planning of advertising media from an IMC perspective were discussed. This chapter will focus specifically on OOH advertising media from a global and South African perspective. Firstly, some background on the development of and conceptualisation of OOH advertising media from an academic and advertising media industry perspective will be presented.

This will be followed by a classification of OOH advertising media types from a South African perspective. The classification of the South African OOH advertising media is the second major objective of the study (see section 1.2.1).

4.2   THE DEVELOPMENT AND GROWTH OF OOH ADVERTISING MEDIA

The earliest OOH advertising was, in its original form, some type of message displayed outdoors to communicate to the public. It is probably the oldest form of advertising in history. It can be traced back a few thousand years B.C. to ancient rock-art paintings in India (Bathia in Surhone & Timpledon, 2010:5) and inscriptions and graffiti in Egypt and Greece (Veloutsou & O'Donnell, 2005:218). However, OOH advertising media have undergone a renaissance in recent years, as advertisers have realised that this form of advertising has greater impact and more specific reach than was previously thought; and these media have become some of the fastest- growing media segments across the globe (Iveson, 2012:5; Lopez-Pumarejo & Myles, 2009:35; Magna Global, 2011:24).

Although the exact total amount spent on OOH advertising media is hard to determine, because of the industry's diversity, this avenue of advertising ranks second only to the Internet as the fastest-growing media in the United States of America (Moriarty *et al*. 2012:364). Currently, there are more than 118 000 outdoor advertising boards in the urban centres across the United Kingdom (Hackley, 2010:55); and there are more than 300 advertising boards and 200 digital flat screen monitors with advertising at Heathrow's terminal five – reaching more than 27 million passengers, who pass through it annually (Patrick in Shimp, 2010:578).

The growth and increasing popularity of this channel of advertising can be attributed to several trends. Proliferation and fragmentation in the traditional media have resulted in a move away from the traditional mass media, to considering alternative ways to reach consumers with OOH advertising media.

This drastic increase in mass media options is also apparent in South Africa, as may be seen in Table 4.1. This table illustrates the magnitude of media proliferation. Over little more a decade traditional media grew by 65% - from nearly 900 options to nearly 1500 options – clearly resulting in a fragmented media landscape perspective. The result is that OOH advertising media have now become a viable and cost-effective alternative for marketers, who are frustrated by the inability of the more-traditional media to effectively reach people when they leave their homes.

Table 4 1: Increase in traditional advertising media options in South Africa

Medium	1998	2011
TV Stations	37	160
Radio stations	120	173
Daily Newspapers	17	22
Major Weeklies	20	27
Consumer magazines and newspapers	450	630
Communality Newspaper & Magazine	255	470
Total options:	*899*	*1482*

Source: Media manager in OMD , 2011

Contemporary consumers understand marketing communication and advertising techniques, which make them increasingly more resistant to commercial messages. Likewise, with customers who have become truly marketing literate and start avoiding traditional advertising, companies have now started to employ new

strategies, by using non-traditional or support media in an attempt to break through the clutter, and grab the viewers' attention. Belch and Belch (2012:446) note, in this context, that innovative ways of applying non-traditional OOH advertising media, such as transit media, street furniture advertising, aerial and water-borne advertising, mobile billboards, and in-store media, such as in-store ads, shopping trolley signage, and in-store digital TV are now more frequently used as support media to reach selected segments of the market that cannot be as effectively reached by traditional advertising media.

Moriarty *et al.* (2012:364) agree, and they add that OOH advertising media can also target selected market segments with specific messages at a time and place, where they are mostly likely to be interested. For example, a digital sign at an airport can make travellers aware of some last-minute specials that are duty free, an advertisement at the train station can remind commuters where to get their mornings coffee, or an advertisement inside a gymnasium can inform health-conscious people on the latest nutritional supplements.

OOH advertising media can reach consumers outside their homes – where most people spend most of their day at work – or otherwise away from home. This is not possible with traditional media, such as television, radio, magazines or newspapers. Consumers worldwide are more mobile than ever before, due to the urbanisation and centralisation of economic activities. Not only are they now more mobile, but they also spend significantly more time commuting between home and work, due to traffic congestion and distance.

South Africans spend on average 59 minutes each day commuting, compared with the 45 minutes spent by commuters in the United Kingdom, 44 minutes in Germany, and 43 minutes in the Netherlands (World Bank in Provantage, 2010). This increased time spent outside homes in the open air, whether for recreation or simply commuting from one place to another, presents an opportunity for this medium.

4.2.1 CONCEPTUALISATION OF OOH ADVERTISING MEDIA

The OOH advertising media are far more expansive than they used to be, and the shapes and formats of these media globally, as well as in South Africa, have changed considerably over the past few decades. Until rather recently, the OOH advertising media landscape consisted primarily of outdoor advertising or billboards reaching vehicular traffic; but these days, this has expanded to include a wide range of OOH advertising media types – to reach mobile people wherever they live, work, play, drive, shop or commute.

Collectively, these formats are now known as OOH advertising media. Thus, OOH advertising media as a category, embrace all indoors and outdoors advertising that one encounters when leaving one's home or workplace, such as advertising seen from a car or taxi, in a bus or a train, on highways or indoors at shopping malls, sport stadiums, airports – up, down, all around and even underground train stations (Bernstein, 2005:5).

The concept of outdoor advertising, which emphasises the open air or outdoors aspect of this type of advertising, continues to this day. However, lately there has been a growing preference to use the broader concept, namely: Out-of-home advertising. This OOH advertising includes outdoor advertising in the public domain, such as advertising on billboards next to a highway; but it also includes other non-domestic OOH advertising – not necessarily outdoors communication – such as advertising at airports, train and subway stations and entertainment or retail venues, like shopping malls, health clubs, doctors' rooms, public restrooms and restaurants (Gambetti, 2010:37; Wilson & Till, 2008:59).

This broad spectrum of OOH advertising media types is also confirmed in some of the recent literature, to include not only outdoor advertising, but also transit advertising on buses, trucks, taxis and even hot-air balloons, to indoor-media as a large part of OOH advertising media, such as signs in shopping malls, advertisements on shopping trolleys, shopping bags and even public restrooms (Moriarty *et al*., 2012:365; Sissors & Baron, 2010:263).

4.2.1.1   The OOH advertising media from an academic perspective

A number of academic sources position OOH advertising media within the larger group of support media to strengthen the message that is sent to the target audience through traditional media, such as radio, television, newspapers and magazines (Belch & Belch, 2012:447; Du Plessis *et al.,* 2010:107). For example, Belch and Belch (2012:447) differentiate between traditional and non-traditional support media. Traditional support media include the following classes: outdoor advertising; digital outdoor advertising (video-advertising networks, digital billboards and ambient advertising that uses digital technology to send messages), alternative OOH media (aerial advertising, place-based and mobile boards), in-store media (point-of-purchase advertising, such as in-store advertisements and media, aisle displays), transit advertising and cinema advertising.

Non-traditional support media consists mainly of branded entertainment, which is a mix between marketing and entertainment, and includes a wide variety of options, such as product placement in movies and television programmes; product integration where the brand is woven through the programme content and becomes part of the story line; "advertainment" where videos, music concerts, live performances are created by advertisers to entertain the audience, while their branding thereof is known.

Du Plessis *et al. (*2010:107-111) follow a similar approach to include outdoor advertising, in-transit advertising, advertisements within cinemas and theatres, promotional product marketing, directory advertising, in-flight advertising and branded entertainment within the overall class of OOH advertising media.

Other sources, such as Moriarty *et al.* (2012:364) refer to OOH advertising media as "place-based media" – to target specific people at specific places or venues – but classify it as a part of the traditional media. According to Shimp (2010:576), OOH advertising is not a typical or traditional form of advertising, but should rather be seen as a communication mode that attempts to influence consumers at the point-of-purchase or close to it. He uses the term "signage and point-of-purchase communication" comprising on-premise signage, OOH off-premise advertising media, as well as point-of-purchase advertising.

Despite the differences on the position of OOH advertising within the larger context of IMC, it is clear that it can be used to support traditional media, as part of an overall IMC plan (Du Plessis *et al.,* 2010:107), to reach specific consumer profiles (Moriarty *et al*., 2012:364) to communicate to consumers close to or even at point-of-purchase in an attempt influence them when purchasing decisions are being made (Shimp, 2010:576).

Not only do sources differ on the position of OOH advertising within the larger context of IMC, there also seem to be different opinions on the major types of OOH advertising media. There is some disagreement in the academic and advertising media industry literature on exactly what constitutes OOH advertising media. A comparison of some of the prominent academic sources published during the past decade, as well as some of the more prominent OOH advertising media associations across the globe on exactly what forms part of OOH advertising media, can be seen in the Table 4.2. These two perspectives will be compared and discussed in the following sections and will form the foundation of the classification of OOH advertising media from a South African perspective that follows.

When considering academic sources over the past decade, it is apparent that the major OOH advertising media platforms grew from mainly being outdoor advertising in the past, to now include a variety of non-traditional options, such as transit advertising media, street and retail furniture advertising (Duncan, 2005:372; Gambetti, 2010:35; Lane *et al*., 2011:359, Moriarty *et al*., 2012:364; O'Guinn *et al*., 2000:507, Shimp, 2003:356; Sissors & Baron, 2010:441; Wells *et al*., 2006:227; Yeshin, 2006:328).

More recently, a variety of digital OOH channels have also been introduced, such as digital-video screens that appear in places, such as offices, retail stores, shopping malls, 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. This has become one of the fastest-growing areas within this sector; and this is clearly an indication that OOH media are now entering the digital era, just like most other media (MagnaGlobal, 2011:24).

Some sources have followed a more extended view, to include a number of additional non-traditional media or marketing communication options not considered by the others to form part of OOH advertising media, such as Duncan (2005:376) and Moriarty *et al*. (2012:364).

Duncan (2005:376) considers a whole variety of alternative options, such as cinema and video advertising, kiosks with electronic advertising, banner displays on ATMs, advertising on elevators, advertising on shopping trolleys and even product placement as part of OOH advertising media, since all of these form part of place-based media or out-of-home advertising in public venues.

Moriarty *et al*. (2012:364) specifically include on-premise or retail signs on the premises of businesses, restaurants, or shopping centres to identify their business or store. They argue that on-premise or retail signs can either be simple: just to identify an outlet, such as the MacDonald signs; or they can be more complex, to perform similar functions that billboards do, such as the large illuminated and even animated or digital signs in Las Vegas. They, therefore, regard on-premise signs as forming part of OOH advertising media.

However, Shimp (2010:578) disagrees and clearly distinguishes between on-premise signage and off-premise advertising. Only off-premise advertisements, which are typically used in an attempt to influence consumers' store or brand selection decisions, should be regarded as OOH advertising, while on-premise signage used by retailers for identification purposes is not regarded as OOH advertising.

Table 4 2: A comparison of the academic and advertising media-industry perspectives on OOH advertising media

Major OOH Platforms included in classification of OOH advertising media	Outdoor Advertising	Transit Media Advertising	Street & Retail Furniture Advertising	Digital OOH Channels	Additional media /types added
Academic perspective					
O' Guinn et al. (2000:507)	☒				
Shimp (2003.356.357)	☒	☒			
Duncan (2005:372)	☒	☒			Cinema/ video advertising Electronic Kiosks', Banners displays on ATMs, Advertising on elevators, Advertising on shopping trolleys, Product placement
Yeshin (2006: 328)	☒	☒			
Wells et al. (2006:227)	☒	☒		☒	
Sissors & Baron (2010:441-421)	☒	☒		☒	
Lane et al. (2011:359)	☒	☒	☒	☒	
Moriarty et al., (2012:364)	☒	☒			On-premise signs
Belch & Belch (2012: 578-568)	☒	☒	☒	☒	
Advertising media industry perspective					
Out-of-Home Media Association of South Africa (OHMSA, 2012[1])	☒	☒	☒	☒	Activations/ sales promotion
The Outdoor Media Association of New Zealand (OMANZ, 2012)	☒	☒	☒	☒	
Outdoor Media Association of America (OAAA[2], 2012)	☒	☒	☒	☒	Cinema advertising
The Outdoor Media Association of Ireland (OMA Ireland, 2012)	☒	☒	☒	☒	
Out of Home Marketing Association of Canada (OMA Canada, 2012)	☒	☒	☒	☒	Place based venues
Outdoor Media Association of Australia (OMA, 2012)	☒	☒	☒	☒	
Outdoor Media centre of the United Kingdom (OMC, 2012)	☒	☒	☒	☒	Cinema advertising

4.2.1.2   OOH advertising media from an industry perspective

The variety and growth in OOH advertising media types are also confirmed when looking at professional OOH advertising media associations from South Africa, New Zealand, America, Ireland, Canada, Australia and the United Kingdom. Compared with the academic viewpoint, these OOH media industry associations seem to be leading the way with their inclusion of even a wider variety of OOH advertising media types.

In order to understand the reason behind this classification, the method or criteria used should be taken into account. Some of these international trade associations, such as the Out-of-home Media South Africa, Outdoor Media Association of America and OMA of Ireland and Outdoor Media Association of New Zealand, have classified OOH advertising media primarily based on media format (OHMSA, 2012[1]; OAAA[2], 2012; OMA Ireland, 2012; OMANZ, 2012). This implies that a sign board would be classified as an outdoor advertising sign or a billboard regardless of whether it is located next to a road aimed at vehicular traffic, or at a train station aimed at commuters, or the entrance of a shopping mall aimed at shoppers.

The other trade associations, Out-of-Home Marketing Association of Canada, Outdoor Media Association of Australia and Outdoor Media Centre of the United Kingdom have classified OOH advertising primarily based on the audience environments, as opposed to media format or type (OMA Canada, 2012; OMA:2012; OMC, 2012). Their classification schemes can be divided into four different OOH advertising environments, specifically:

- *Roadside environment*: outdoor advertising next to the roads, and roadside-other-smaller format external advertising on street furniture, taxis, buses and trams;
- *Transport environment*: bus/tram internals, airport terminals and precincts, railway stations and bus terminals;
- *Retail and leisure environment:* advertising panels at or inside shopping centres, as well as inside the parking areas or other gathering areas;
- *Place-based environments*: specific venues or places, such as at university campuses, restaurants, bars and nightclubs, medical clinics, hospitals, golf courses and sport stadia.

When using environments, such as these classification criteria, an advertising board would be classified primarily depending on the audience environment where it is located. If the board is next to the road reaching vehicular traffic, it would be classified as roadside media; but if it is located at an airport reaching air travellers, it would be classified as transport media.

This option of considering the environment as the primary classification criterion seems to be more marketing-oriented, given that the focus is on the potential audience or the media environment, where they would be exposed to the medium, rather than following a more product-oriented approach, by merely considering media formats or types. Advertising in the roadside environment, using boards located on key arterial routes and busy urban streets, can be used to reach major markets. Advertising in the transit environment allows effective geo-demographic targeting, in order to target certain transport-user groups.

On the other hand, advertising in retail and leisure environments can deliver a message to shoppers; and placing it at a specific place or location, for example university campuses or medical clinics, could reach a more specifically targeted profile, such as students or people likely to consider pharmaceutical or health-related advertising.

For the current study it also important to consider the South African perspective. The official South African trade organisation, the Outdoor Media Association of South Africa includes the following media formats in their classification (OHMSA, 2012[1]):

- *Outdoor advertising*: all forms of billboards, such as large formats or super signs, scrollers, rank station branding, smaller internally illuminated billboards;
- *Walls, murals and building wraps*: advertising on existing buildings and constructions;
- *Street furniture*: smaller formats on arterial or pedestrian routes, such as ID light (street identification signs), street-pole and lamp-pole advertising, advertising on bus or taxi shelters, advertising on bins and benches, or at parking lots;
- *Retail advertising*: advertising outside or inside retail and entertainment areas;
- *Moving transit media*: mobile advertising on all types of vehicles, such as buses, taxis, trailers, cars, trains and trucks;

- *Static transit media*: internal and external billboards, signs and internal displays located at airports, railway stations, taxi ranks, bus terminals and Gautrain stations;

- *Electronic outdoor advertising*: electronic and digital electronic billboards and plasma screens;

- *Sports stadium promotions and -advertising*: billboards, electronic banners and promotional activities during sporting events;

- *Activations*: promotions at shopping malls and in stores, and promotions targeting commuters;

- *Ambient OOH media*: almost any kind of OOH advertising media advertising that occurs in a non-traditional OOH advertising medium, such as airborne or waterborne advertising, flags, inflatables, advertising at various public places, such as gymnasiums and petrol garages.

This classification matrix of the OOH advertising media in South Africa is based on a combination of format and media environment criteria. It comprises traditional media formats, such as outdoor advertising, advertising on walls, murals and building wraps. However, it also regards some non-traditional and new elements as being part of the South African media landscape, such street and retail furniture advertising, moving and static transit media, electronic/digital outdoor advertising, sports stadium promotions and advertising, activations/promotions at shopping malls, in stores or commuter areas, airborne and waterborne advertising, flags, inflatables, and place-based advertising, such as advertising at doctors' rooms or gymnasiums.

In summary, these two perspectives have some disagreement on the inclusion of some communication elements, such as sales promotions, cinema, on-premise signs and a variety of new alternative outdoor communication options. There is also a trend to include some non-conventional formats, such as digital and a range of ambient communication channels.

However, despite the different ways of approaching the classification, and some differences about exactly what constitutes OOH advertising media, both the academics and the advertising media industry perspectives agree on the vast range

of indoor- and outdoor formats in a variety of environments. In spite of the differences between these two groups, most sources seem to be in agreement on the inclusion of outdoor advertising, street and retail furniture advertising, transit media advertising and more recently digital and ambient OOH advertising media.

4.3 CLASSIFICATION OF OOH ADVERTISING MEDIA IN SOUTH AFRICA

In the light of the global context and conceptualisation of OOH advertising described above, the following sections will focus more specifically on OOH advertising media in South Africa. OOH advertising comprises a wide variety of media types, as seen in Figure 4.1. In South Africa, more than 1billion Rand was spent on OOH advertising media in 2009, with spending on outdoor advertising or billboards representing the largest share of approximately 68%. The second largest category was airport advertising (17%; R181 500 528) followed by retail and street furniture advertising, such as signs, benches and in kiosks (10%; R108 210 819), transit media – such as advertising taxis, buses and trains (2%; R27 094 368); advertising on walls and painted murals (2%, R16 619 688), and commuter promotions, such as sales promotion activities aimed at public commuters (1%; R9 248 385).

The OOH advertising media landscape has expanded even more, to include a variety of new out-of-home types, such as new transit media at the Gautrain stations and the bus-rapid transit system and digital media (Benjamin, 2011).

Figure 4.1: Major OOH advertising media categories for South Africa, 2009,
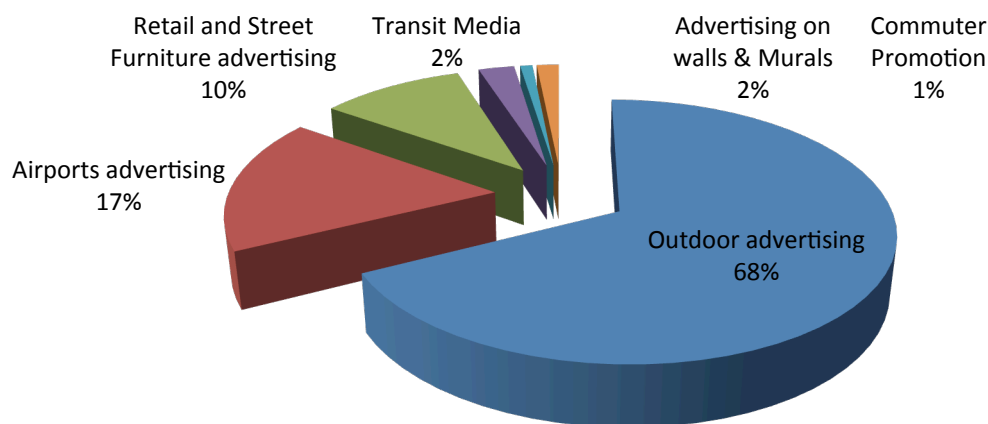
Total OOH revenues R 1,061,162,238

Source: Adex m/e May '09 in Provantage, 2010

Not only have the types of OOH advertising media expanded, but they also seem to be used by some of the top advertisers in the country, as shown in Table 4.3. OOH advertising media are now being used by a broad client base, which is a demonstration of their acceptance in the advertising media industry by some of the largest advertisers in South Africa.

These advertisers range from telecommunication companies, financial services, retail sector to fast-moving consumer goods and alcoholic beverage companies. The increase in the number of women in the workforce, as well as the increased expenditure of the emerging market in South Africa has led to more advertisers, such as Unilever, Brandhouse, Shoprite and Massmart, using this medium to reach these women while they are out of their homes.

OOH advertising media provide excellent opportunities to advertisers to reach consumers as last reminders before making decisions as to where and exactly what to buy. This explains why retailers, such as Pick & Pay, Massmart and Shoprite, and food and beverage brands, such as Unilever, South African Breweries and Distell are amongst the heavier users of these advertising media.

Table 4.3: The top ten OOH advertising media advertisers in South Africa, 1st Quarter 2011

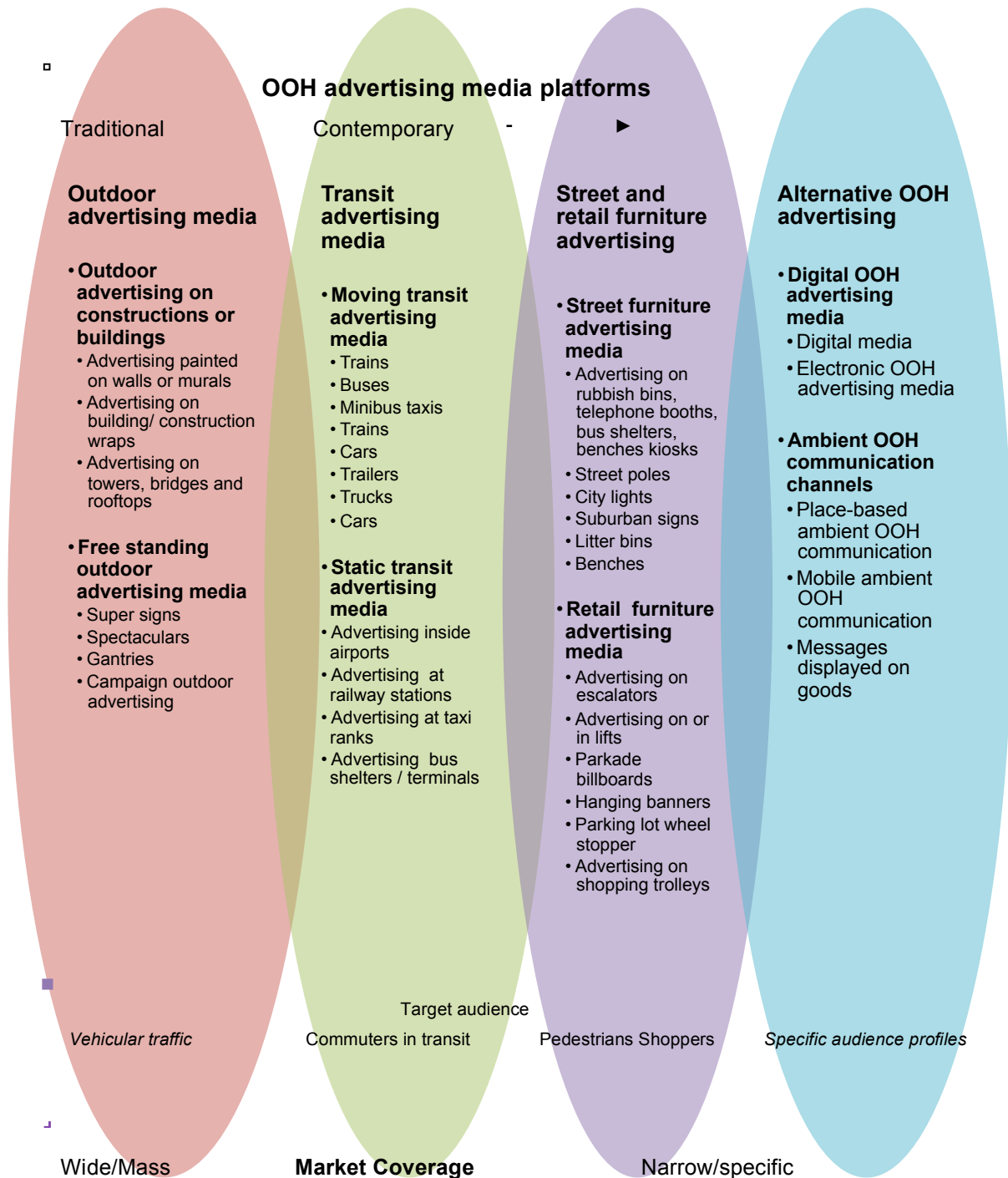| Name of Advertiser	Total Adspend in R000	Adspend in OOH in R000	% of Total
1. Telkom	111,000	15,971	14.39%
2. SAB	139,000	12,824	9,23%
3. Vodacom	100,000	7,920	7,92%
4. Standard Bank	79,000	4,333	5,48%
5. Distell	82,000	3,357	4,09%
6. Brandhouse	97,000	2,222	2,29%
7. Unilever	190,000	3,340	1,76%
8. Pick & Pay	150,000	797	0,53%
9. Massmart	86,000	227	0,26%
10.Shoprite	22,500	240	0,11%

Source: The Media Shop, 2011

Figure 4.2 is a proposed classification of the OOH advertising media in South Africa. It is categorised into four major OOH media platforms: outdoor advertising media, transit media advertising, street and retail furniture advertising and alternative OOH advertising media. Each of these major platforms, in turn, comprises media formats and media vehicles. For example, the outdoor advertising media platform constitutes two media formats, namely: outdoor advertising on constructions or buildings and free-standing outdoor advertising. A media vehicle then refers to a specific type of sign at a specific location or environment. For example, a 4m x 5m super sign next to the N1, the highway between the Botha and John Vorster off-ramp.

This proposed categorisation incorporates the major OOH advertising media types identified by both the academics and industry perspectives earlier. The focus in this scheme will be on the application of these media in the South African environment.

The original or traditional platform is outdoor advertising media, but contemporary platforms have been added lately. Thus some of the more recently introduced types, such as digital or electronic formats and ambient platforms will also be incorporated, to reflect the contemporary extended nature of the media.

Some platforms, such as outdoor advertising and mass transit advertising are more effective for broader coverage, while others such as street and retail furniture advertising and alternative OOH advertising are better suited for targeting narrow or specific audience profiles.

Figure 4.2: Classification of the OOH advertising media in South Africa

OOH advertising media platforms

Traditional — Contemporary — ▶

Outdoor advertising media

- **Outdoor advertising on constructions or buildings**
  - Advertising painted on walls or murals
  - Advertising on building/ construction wraps
  - Advertising on towers, bridges and rooftops
- **Free standing outdoor advertising media**
  - Super signs
  - Spectaculars
  - Gantries
  - Campaign outdoor advertising

Transit advertising media

- **Moving transit advertising media**
  - Trains
  - Buses
  - Minibus taxis
  - Trains
  - Cars
  - Trailers
  - Trucks
  - Cars
- **Static transit advertising media**
  - Advertising inside airports
  - Advertising at railway stations
  - Advertising at taxi ranks
  - Advertising bus shelters / terminals

Street and retail furniture advertising

- **Street furniture advertising media**
  - Advertising on rubbish bins, telephone booths, bus shelters, benches kiosks
  - Street poles
  - City lights
  - Suburban signs
  - Litter bins
  - Benches
- **Retail furniture advertising media**
  - Advertising on escalators
  - Advertising on or in lifts
  - Parkade billboards
  - Hanging banners
  - Parking lot wheel stopper
  - Advertising on shopping trolleys

Alternative OOH advertising

- **Digital OOH advertising media**
  - Digital media
  - Electronic OOH advertising media
- **Ambient OOH communication channels**
  - Place-based ambient OOH communication
  - Mobile ambient OOH communication
  - Messages displayed on goods

Target audience

Vehicular traffic — Commuters in transit — Pedestrians Shoppers — *Specific audience profiles*

Wide/Mass — **Market Coverage** — Narrow/specific

Furthermore, sales promotions and cinema advertising do not form part of OOH advertising media in this classification, since sales promotions are typically regarded as part of traditional promotion, while cinema is regarded as a broadcast or traditional medium (Arens, Weingold & Arens, 2008:523; Du Plessis *et al*., 2010:228; Lane *et al*., 2011:424; Wells *et al*., 2006:249).

Store signage on the premises or attached to a store does not fall within the scope of the current discussion, because this advertising space is used by the store owners or retailers themselves to identify their store and attract traffic to their store. The present focus will be on off-premise OOH advertising media, as used by third-party advertisers, or product and service retailers, and by manufacturers of consumer-oriented brands.

4.3.1 OUTDOOR ADVERTISING AS AN OOH ADVERTISING MEDIA PLATFORM

Originally, outdoor advertising messages were hand-painted on wood or steel frames. New technology now being used to print advertising messages on vinyl, allows advertisers far more creative versatility, vibrant colours, durability and precision-image reproduction than simply pasting the poster panels on the board or hand-painting posters.

Contemporary outdoor advertising refers to all large-format advertising displays viewed from the road; and it is typically intended for viewing from extended distances by vehicular traffic, while driving. Outdoor advertising is still the most popular OOH advertising medium in South Africa if the advertising expenditure is compared with that spent on other types of media in this class (Adindex in Provantage, 2010).

Outdoor advertising signs on highways and major arterial roads are typically used by advertisers, as mass media to reach a broad market of motorists and commuters who spend long periods in traffic every weekday. This vehicular traffic is repeatedly exposed to the advertising messages for longer periods of times, resulting in very high-frequency viewing.

This media platform offers geographic flexibility, since it can be used in a national, regional, or on a local basis. National advertisers globally and in South Africa, often use it to maintain top-of-the-mind awareness for their brand, by targeting selected markets, or to support the messages of IMC campaigns sent by other advertising media (Davidson, 2001:89; Katz, 2010:89). Many local businesses prefer to use outdoor advertising rather than the mass media, because it can provide targeted exposure to their specific geographic markets, without any wasted exposure (Wells *et al.*, 2006:229).

n South Africa, the potential impact of such super-large outdoor advertising formats, such as wraps around buildings, or constructions, have only recently begun to be exploited by some advertisers. Several examples of large outdoor advertising formats could be seen during the 2010 Soccer World Cup. First National Bank (FNB) launched an OOH advertising campaign with a 600m² wall-mounted outdoor advertising sign at Johannesburg's Park Station. This enormous illuminated outdoor advertising board could be seen by road users driving along Rissik Street and Nelson Mandela Bridge, as well as by commuters passing through the station every day. It also featured a clock indicating the countdown to the 2010 Soccer World Cup, linking it in this way to FNB's sponsorship of this event.

Another sponsor, MTN, promoted their brand on a 2000 m^2 building wrap with a 3D soccer ball exploding through the side of a building in Braamfontein, Johannesburg (BOO! Alternative Media Communications, 2010).

Advertising on huge outdoor advertising formats, such as spectaculars, super signs, wall murals, or building wraps, can add importance or brand status by projecting an image with authority for the brand being displayed (Bernstein, 2005:114). The high-impact larger-than-life size of outdoor advertising is noted as a major strength of the medium in several sources. According to Shimp (2010:583), when advertising on these huge formats, the brand literally becomes larger than life. This ability to use large representations offers marketers excellent opportunities for brand- and packaging identification.

Katz (2010:91) notes that the size of the medium helps it to be noticed; and that it serves as a constant reminder, because a large mobile population can see it from a distance.

Sissors and Baron (2010:277) compare outdoor advertising media to other media and suggest that it offers the best value to advertisers, when they require a larger-than-life approach, when they need to convey product features, when they want the packaging to be recalled or identified. Belch and Belch (2012:454) note that because of its impact, large print and creative ability this can create high levels of awareness.

According to Graff (in Moriarty *et al*, 2012:366), the size of outdoor advertising media can do more than just attract the attention of consumers, it could also be employed to differentiate the brand from those of the competitors. The creative possibilities due to the size, colour and three-dimensional designs, can be employed to create a "huge canvas" – on which the brand advertisers can communicate visual brand messages that could link the brand with the relevant icons and symbols.

The broad reach and high levels of frequencies obtained by outdoor advertising are other reasons for using this platform (Du Plessis *et al.*, 2010:107; Lane *et al.*, 2011:361; Wells *et al.,* 2006:209). This is a result of its ability to deliver repeated permanent exposures of the message to the mobile part of a population for 24 hours a day (Shimp, 2010:581). The repeated exposure to a message has also been shown to have a significant effect on the level of recall by the consumers living or working in the area (Bhargava *et al.,* 1994:54).

However, outdoor advertising media is definitely not without its limitations. One such limitation is the brief message exposure. The mobility and speed of the audience reached by outdoor advertising typically results in brief exposure to the message. This limits the message capabilities; and it, therefore, requires the use of a small number of words/illustrations and simple messages (Moriarty *et al.*, 2012:365). Copy-testing is one way to ensure the readability of OOH messages (Sissors & Baron, 2010:264).

The limited demographic selectivity of outdoor advertising can result in waste coverage to people who are not part of the target market. Advertisers, therefore, often use other media, such as magazines and radio, to better pinpoint the audience selection. The medium also suffers from some image problems, as a result of the negative attitude to outdoor advertising media held by some people, who feel that the environment is being thereby polluted (Shimp, 2010:583).

The two major outdoor advertising formats, namely, advertising on constructions or buildings and free-standing outdoor advertising signs will be presented in the following sections. Some examples of how this media can be applied in a South African context will also be included.

4.3.1.1 <u>Outdoor advertising on constructions or buildings</u>

Outdoor advertising on constructions or buildings utilises existing urban structures, in order to host outdoor advertising, such as around construction sites, on existing buildings or walls, or advertising on towers and bridges (SAMOAC, 2008:26). Since these formats are often temporary or attached to existing building structures, they can be regarded as more advantageous to the environment, leaving no long-term impact.

Constructional site wraps and hoardings at the bottom of buildings are temporary fences erected around building sites or infrastructural development in central business district areas, almost like large billboards over a few metres long (Primedia, 2010). In high traffic and urban areas, these formats offer effective ways to convey an advertising message to a wider audience. This space is then rented for advertising purposes, while the building may still be in the process of construction (see Figure 4.3).

Wall murals and building wraps are more permanent advertisements on one wall or an entire building; and they are located close to major freeways and highways, along commuter routes and in business districts. Building wraps are often several storeys high and, depending on the location, can sometimes be seen for many kilometres.

Figure 4.4 illustrates an example of the creative and effective use of new technology on a building wrap for the NIKE 2010 campaign in the Johannesburg CBD, with the theme of "Writing the future". The audience could engage in and interact with the communication process by sending an SMS on their cell-phone, or messages on social media platforms, such as face book, twitter, and mixit, to participate in "Writing the future". These messages can then be displayed on a large interactive LED screen, mounted on the side of the iconic Life Centre Building (Graffiti, 2010).

Figure 4.5 shows the cooling towers between Soccer City and Nasrec, which were painted for Coca-Cola during the World Cup Soccer in 2010. The surface of these structures provides ideal opportunities for painted or wrapped advertisements, which may enhance the visual environment, especially when using themes that reflect the local culture or history to contribute to the local scene – such as those seen on the cooling towers branded by FNB.

4.3.1.2   Free-standing outdoor advertising media

Free-standing outdoor advertising media, also referred to as billboards, are advertising structures, which are not attached to a building or to other structures. In South Africa, the size of outdoor advertising formats ranges from relatively small (3.6mx2.5m, 3mx2m, 3mx6m) to much larger (3mx12m, 4.5mx18m, 9mx6m, 12mx12m) (OHMSA, 2012[1]).

Large signs (spectacular outdoor advertising, super-signs and gantries) are typically located facing major highways, such as the N1, N3, M1, M2, R24 and R21 or close to the entrances to major cities, such as Johannesburg, Pretoria, Durban, Cape Town, East London, Bloemfontein, and Nelspruit. These larger signs are often used to target higher LSM 7-10 groupings that work or live in these urban areas.

Figure 4 3: Constructional site wraps close to Maponya Mall, Soweto

Figure 4 4: Building wraps for Nike, Johannesburg

Figure 4 5: Advertising on the cooling Towers at Soccer City, Johannesburg

Source: The Researcher, 2011 & OHMSA. 2012

Super signs or super-outdoor advertising signs are large standard-sized outdoor displays between 36m^2 and 81m^2 found on major arterial routes and at major traffic convergence points in metropolitan areas (SAMOAC, 2008:17). Figure 4.6 shows an example of a super outdoor advertising sign at a taxi rank in Umlazi, a township on the east coast of KwaZulu-Natal that was used as a long-term branding display by Vodacom, a large cell-phone and telecommunication operator in South Africa.

Spectacular outdoor advertising displays, sometimes referred to as walls capes, are very large, typically over 50 m^2, non-standard elaborate structures located at strategic land-mark positions, on highways and in urban areas; and they are generally illuminated. This format is not standardised; and it comprises a wide variety of unusual creative sizes and shapes that are custom-designed to gain maximum attention through special eye-catching effects, such as cut-outs, extensions or 3D designs, fibre optics, giant internally illuminated panels, three-dimensional sculpted features, video-screens, hydraulic movements, or computer graphics (Outdoor network, 2010).

Gantries are outdoor advertising displays fixed to an overhead structure, such as bridges, walkways or free-standing boards to span a road, thereby offering maximum exposure – due to their position right in front of the approaching vehicular traffic (SAMOAC, 2008:17). A popular location for advertising gantries is at the entrances to major centres in South Africa. Figure 4.7 show a gantry at Nelspruit, which was one of the 2010 Soccer World Cup host cities. On the gantry is a huge Vuvuzela, a unique South African soccer symbol, which offered MTN high-impact exposure to visitors from Africa and overseas during the world cup.

The portrait of the proud football supporter with his head shaved – almost like a soccer ball – passionately blowing his Vuvuzela welcomed the World-Cup supporters and players as they entered Nelspruit. This formed part of MTN's IMC campaign for the 2010 Soccer World Cup (Outdoor network, 2010).

Campaign outdoor advertising displays are standard-sized formats advertising typically aimed at slow-moving traffic, pedestrians and shoppers. Campaign outdoor advertising uses boards not larger than 18 m², with 3m x 6m being the most popular format (commonly known as 48 sheet signs) in South Africa (SAMOAC, 2008:18).

Campaign outdoor advertising is typically used in rural, peri-urban and urban metropolitan areas, to reach geographically targeted audiences. This advertising medium is also often used in traditional township areas, at taxi ranks, or close to local shopping centres, to target the emerging market, while it is also found close to up-market areas and on the way to shopping malls (Primedia, 2010).

Some of these outdoor advertising campaigns advertising are depicted in Figure 4.8. The photo on the left is on a small board in a small township close to a local school used by Cadburys to advertise sweets, while the board on the right is located close to Maponya Mall in Soweto. These two examples clearly illustrate the variety within this class in terms of quality, size, location, and architectural structure of the boards.

Research conducted on the attitudes of South Africans towards the outdoor advertising found that overall, there are rather positive attitudes towards this medium. Nagel and Louw (2004) investigated the response of black South Africans towards outdoor advertising in Limpopo, a semi-urban rural area, by using personal interviews. The study found that although the majority of the black South Africans interviewed had a positive attitude towards outdoor advertising in general, the westernized approach of the advertising agencies creating these communication messages was disapproved of by most of these respondents.

The lack of customising, or the failure to adapt the message to a local or African context, or more specifically to the communities' own traditional symbols, values and usages, was also criticised. The findings of this study can serve as a warning against the lack of audience-centric planning, and for not being sensitive to cultural and ethnic differences, when designing outdoor advertising messages.

Pauwels (2005:337) also investigated the effectiveness of outdoor advertising   used to communicate TB- and HIV/AIDS-related messages to South Africans in specific areas. The purpose was to look at how the general principles of message design could be applied in the multi-cultural society of South Africa.

Figure 4.6: Super outdoor advertising at Umlazi

Figure 4.7: Gantry at Nelspruit for MTN before and during the 2010 Soccer World Cup

Figure 4.8: Campaign Boards in township areas

Source: The Researcher, 2011, OHMSA. 2012[2,] Outdoor network, 2010

It is suggested that outdoor advertising should be used to communicate a single strong message, together with other elements of the marketing communication mix, thereby allowing more in-depth information, such as face-to-face counselling and brochures in the context of health.

This South African study, as the previous example, both suggest that it might be necessary to tailor the advertising message and communication mix when using it on a local level aimed a specific local market segment or ethnic group.

4.3.2 TRANSIT ADVERTISING AS AN OOH ADVERTISING MEDIA PLATFORM

Transit advertising is ideal for advertisers who wish to target adults that live and work in major metropolitan areas. It is considered to be an effective means of delivering wide coverage to a large number of people, as well as detailed, repetitive messaging, by placing it on specific routes, or at specific stations (Moriarty *et al*., 2012:367). Transit media can also be used creatively; and they have the potential to bring the advertiser's message straight to a wide variety of commuters, where outdoor advertising may be restricted or not as effective (Provantage, 2010).

However, it has to compete for attention with all the distracting stimuli in the transit environment; it can also be influenced by the mood of the audience, and can result in wasted media coverage to people who are not part of the target market (Sissors & Baron, 2010:266). It can also be difficult for advertisers to use transit media to engage with daily commuters, because they can be tired, bored or too absorbed in their thoughts to even notice a message (O'Guinn *et al*., 2000:588).

According to Veloutsou and O'Donnell (2005:218), transit advertising should be used predominantly as a secondary or support advertising medium, since it works best in conjunction with other mediums, such as television and radio. Transit advertising can be combined with radio advertising (Gray, 2008); or mobile phones which can be used to generate feedback that allows advertisers to examine those who are viewing and interacting with the messages (Wayne, 2010).

Several large advertisers have recently employed transport advertising media to launch new brands and products, as well as for reinforcing current brands.

Advertisers, such as Coca-Cola, PEP, Nedbank and Samsung, have utilised transit advertising successfully as part of their overall IMC strategy – to reinforce their brand message, the sponsoring of specific events, and to communicate existing campaign messages to maintain top-of-the-mind awareness. Telecommunication brands, such as 8.ta, Cell C and Vodacom have also recently extensively used transit media to enhance the launching of some their latest offerings. Frequently, new brands, or new product launches use transit media as part of their original launch strategy, as well to continue with the platform to reinforce their communication (Timms, 2012).

The whole public transport system in South Africa is expected to change drastically, because of the government's national transport master plan, which is a blueprint for transport infrastructural development and investment for SA over the next 45 years. Government funding is being used to establish a fully integrated transport system, through the development of new infrastructure, and the upgrading of existing transport infrastructure that should lead to a world-class transport system (Provantage, 2010).

The national transport master plan recently commenced with the 2010 Soccer World Cup Transportation Infrastructure. It is still busy with various other projects, such as the Taxi re-capitalisation process, SARCC (the South African Rail Commuter Corporation) integration, the new upmarket Gautrain, the bus Rapid Transport system development, and general road and e-toll development projects (Timms, 2012). In future the role of this OOH advertising media platform will probably become even more important with the South African government's current commitment and investment in transport infrastructural development.

In this section, the characteristics of the transit advertising media and the major transit advertising media formats will be discussed. Transit advertising is typically aimed at commuters making use of transportation services on a daily basis, including buses, taxis, commuter trains and aeroplanes. The transit advertising media consist of moving transit media and static or stationary advertising. Moving transit media include displays affixed to the outside of, or inside, moving vehicles, trains, buses or taxis. Static or stationary advertising is positioned in the common areas of train stations, taxi ranks, terminals and airports.

4.3.2.1   Moving transit advertising media

Belch and Belch (2012:452) distinguish between two types of transit advertising media: Interior and exterior. Interior transit advertising is aimed at the commuters riding inside the buses, trains, and taxis. Exterior transit advertising, on the side, front or rear of vehicles, is aimed at pedestrians in the streets and people in nearby cars. Interior transit advertising exposes a captive audience to the message for a longer period of time, while inside a bus, train or taxi. Since the time of exposure to the message is longer than that, for example, in outdoor advertising, it may be used for a longer or more complicated message to the target market (Moriarty *et al*., 2012:367).

The nature of public transit advertising media, and in particular minibus taxi transport in South Africa, is rather different when compared to that in some of the discussions and research projects published on transit media in developed countries (Belch & Belch, 2012:451; Veloutsou & O'Donnell, 2005:202; Wilson & Till, 2008:58). The public transport in these countries is well developed in urban centres; and the broad public make use of it.

In South Africa, minibus taxis are the most popular mode of transport in urban areas for the majority of South Africa's population. The minibus taxi industry is not part of the public transport sector; but currently, it carries 65% of South Africa's commuters, which mainly consist of the black emerging market. The South African minibus taxi industry has minibus taxis transporting up to 16 passengers, where smaller taxis transporting only a few passengers are used in other European countries. Minibus taxi commuters are seen as a captive audience in a controlled environment, considering that these commuters spend on average about 58 minutes daily inside a taxi – where they are being exposed to advertising media.

This emerging market makes use of a combination of transport, such as buses, minibus taxis, trains and motor vehicles. And more than one mode of transport could often be used to reach work or home on a daily basis (Du Plooy & Du Plessis, 2011:756).

Research findings by Comutanet one of the largest research companies in South Africa, specialising in transit media, reveal some important aspects of the media and consumer behaviour of commuters. In South Africa, 19 million people commute daily. A large percentage of these commuters leave home before 6:00 and get back home after 18:00. This leaves limited time for exposure to traditional media. Every day, they spend a huge amount of their time in taxis or waiting at taxi ranks. The average income of this emerging class is increasing annually. Their spending is no longer limited to basic products, but also includes luxury brands and products such, as Nescafe, Johnnie Walker Black label, and luxurious brands of perfume, clothing and accessories (Comutanet, 2011).

Du Plooy and Du Plessis (2011:764) assessed the effectiveness of minibus taxi advertising in South Africa, by interviewing regular minibus taxi commuters on their attitudes, perceptions and the attention given to minibus taxi advertising. The results showed that the captive audience had strong positive feelings on advertising in general; and they enjoyed looking at advertisements and found this pastime entertaining, which concurs with the findings of Veloutsou and O'Donnell (2005:217), who assessed the response of taxi cab commuters in Scotland. The South African study also suggested that an integrated approach should be followed in utilising traditional advertising mediums combined with OOH media, and specifically taxi advertising, to reach this emerging market.

This unique South African medium is ideal for reaching the emerging market, by targeting pedestrians, drivers and vehicle passengers in specific areas, as it offers a combination of mobility and visual impact.

4.3.2.2 Static transit advertising media

Static transit advertising can be found at airports and public transport areas, such as stations, platforms and terminals. Airport advertising represented 17% (Adex, 2009) of OOH expenditure in South Africa during 2009. Airport advertising includes interior and exterior airport displays. Interior airport displays are located throughout the terminals in the arrival and departure areas, ticketing areas, baggage-claim areas, gate-hold rooms, concourses, entrances/exits, retail shops and VIP lounges. Exterior airport displays appear along airport and terminal roadways in the form of billboards, spectaculars or overhead signs (Provantage, 2010).

Airport advertising is a unique environment for advertisers to reach a captive audience of international and domestic business and leisure travellers. The specific placement or location of advertisements inside airports is crucial for success, and should be placed strategically to build brands for appropriate products or services, and to elicit direct response, or to encourage point-of-sale information, particularly for car rental, accommodation or tourist attractions (Wilson & Till, 2008:70).

Figure 4.9 shows some of the static and mobile minibus taxi advertising formats used to reach the emerging market segments of South Africa.

Figure 4.10 shows how drastic the impact was for the improvement for some of these environments, such as the Baragwanath minibus taxi rank, before and after the upgrading of the infrastructure. These photos show the unique nature of minibus taxi transit advertising media in South Africa, as well as the transformation resulting from the upgrading of the transport system by the government.

Figure 4.9: Transit advertising media reaching the emerging market

Figure 4.10 Baragwanath minibus taxi rank – before and after the upgrading

Source: Provantage, 2010

4.3.3 STREET AND RETAIL FURNITURE ADVERTISING AS AN OOH ADVERTISING MEDIA PLATFORM

Not all OOH advertising media are large and directed at vehicular traffic or commuters, as discussed in the previous sections; but they also include some smaller formats, such as street and retail furniture advertising targeting pedestrians and shoppers. Advertising on street and retail furniture consists of advertising on public facilities and structures (hence the name); and it includes benches, street poles, elevators, lifts and kiosk, which are not sites primarily intended for advertising

viewed by vehicular traffic, but which are provided for pedestrians, commuters or shoppers.

Street and retail furniture advertising displays are typically positioned in close proximity to pedestrians and shoppers, or at the kerbside for eye-level viewing (Primedia, 2010).

4.3.3.1   Street furniture advertising media

Street furniture advertising media allows for geographically targeted advertising in specific areas; and it is especially effective for directing the messaging to highly defined commuting and pedestrian audiences on specific roads in urban areas (Lane *et al.,* 2011:375). Smaller OOH advertising formats, such as street and retail furniture advertising are allowed in suburban areas and pedestrian environments, such as pedestrian streets, urban parks and open spaces, picnic sites, shopping-centre parking areas, taxi ranks and other public transport nodes, where larger outdoor advertising media are not usually permitted (SAMOAC, 2008:21).

Thus, it is generally found in urban centres and pedestrian environments throughout South Africa. It is usually located at busy intersections on the roads, close to office parks, shopping centres, taxi ranks and other public transport nodes. It, therefore, offers a unique and cost-effective advertising opportunity in suburban areas.

Not all street furniture advertising takes place on typical furniture or fixtures, such as benches, shelters or kiosks; but it also includes other advertising vehicles, such as street-pole advertisements, which are small illuminated display advertisements placed on street lamp-poles located on primary and secondary arterial roads in business and residential areas that target persons in slow-moving automobiles and pedestrians. It is a very popular and widely used form of street furniture advertising in South Africa (SAMOAC, 2008:21).

Street furniture advertising displays are relatively small, but when used repetitively, so that the subsequent signs in a row tell an intriguing story, this can result in a uniquely powerful advertising medium.

Figure 4.11 show some examples of street and retail furniture advertising media targeted at audiences in upmarket areas, as well as the emerging market in less-affluent areas of South Africa. The advertising campaign seen in the three photos on top of the figure was for Stimorol chewing gum, with the first street-pole advertisements showing Yoda (a Star wars character) putting a piece of chewing gum in his mouth; the next image shows him getting older with his ears drooping; while the last image shows Yoda holding the gum in his hand, and with the slogan: "New longer-lasting flavour."

The KitKat advertisements for Nestlé in the middle show that a perfect fit between the creative execution and the media format can the increase the impact. It clearly shows the positioning of the brand; and it highlights the message: "Take a break, have a Kit Kat". Both these examples portray the successful application of an important principle of effective advertising, namely: to achieve synergy between the advertising message and the unique characteristics of a medium, in order to maximise the effectiveness thereof.

The photos in the middle right of the Figure 4.11 show kiosks at minibus taxi ranks, which were used by a well-known South African brand to target the emerging market at taxi ranks. Street and retail furniture advertising clearly does not only offer advertising space, but as the name indicates, but can also serve as functional fixtures or equipment, such as those kiosks, which offer small entrepreneurs operating from them, a portable store from which to sell their goods to the taxi commuters, who often spend so much time commuting to work and back that they buy convenience goods and groceries near their taxi ranks or train stations.

The photos at the bottom are some examples of advertising in the bathroom at a parking area in an upmarket shopping mall. This type of advertising forms part of retail-furniture advertising media, and will be discussed in the following section.

Figure 4.11: Street and retail furniture advertisements at urban, commuter and retail areas
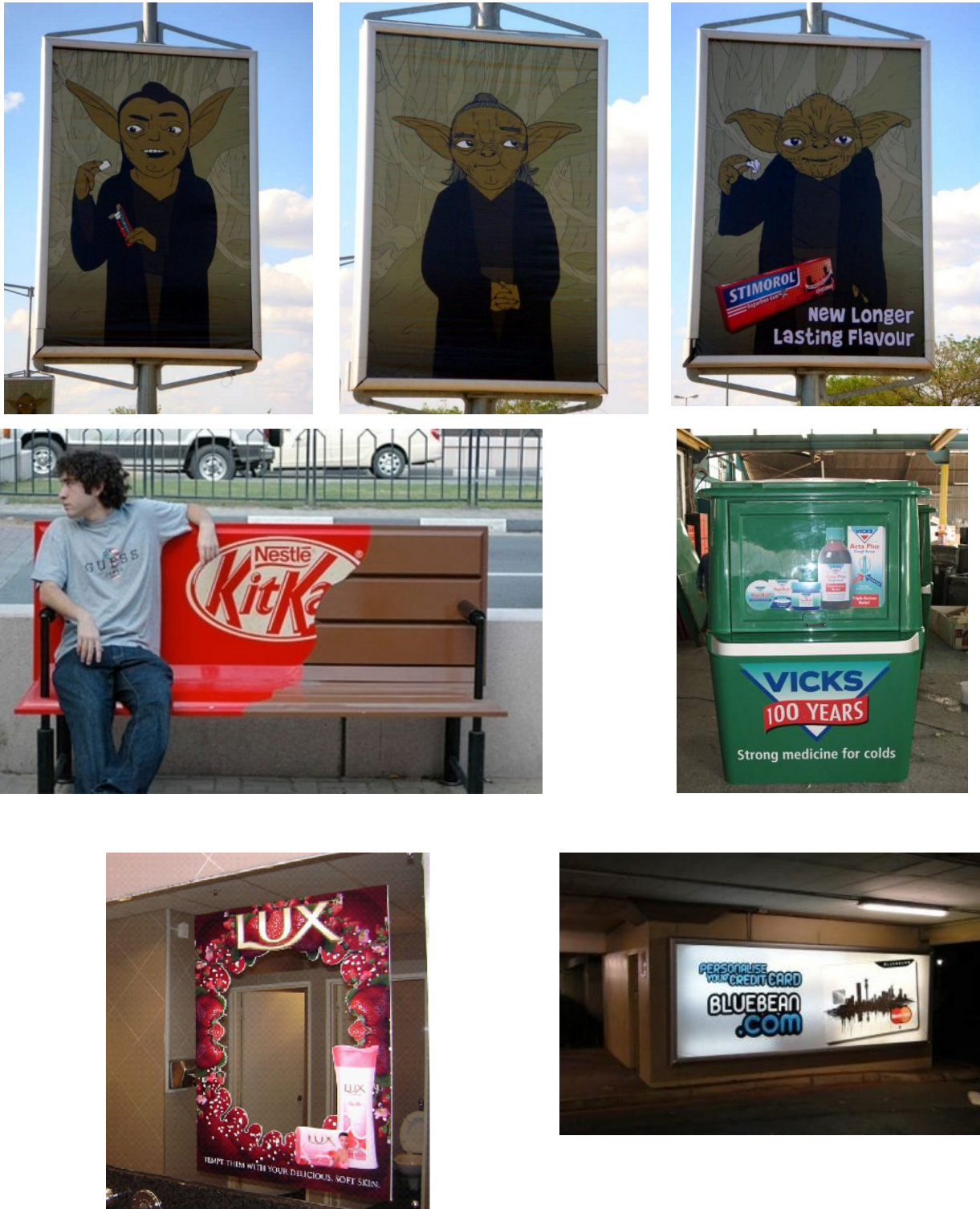
Source: The Researcher, 2011, OHMSA. 2012[2,] Provantage, 2010, Primedia

4.3.3.2 Retail furniture advertising media

Retail furniture advertisements can be found close to the point-of-purchase or central gathering points in the retail environment; and they are primarily used to target potential shoppers. This category of OOH advertising media includes advertising on display outside or inside shopping malls or convenience stores, on furniture or fixtures, such as information kiosks, lifts, escalators, phone booths, bicycle-rack displays, parking booms and shopping trolleys, as well as other advertising media in the retail environment, such as posters or banners in parking areas, or inside the mall itself.

A primary role of advertising – at or close to where the brand is available – is to provide a stimulus or cue to shoppers, at or just before the moment of making a purchasing decision, by reminding them of the brand information acquired from other advertising media (Moriarty *et al.*, 2012:365).

This role can be explained by the well-known principle of cognitive psychology: the encoding specific principle – which means that information recall is enhanced when the context in which consumers retrieve information is similar to the context in which they originally encoded or received the information. Traditional advertising, inform consumer about a brand and its features at their homes, typically away from where the final purchase decisions are made.

However, often they are not able to recall or retrieve this information at the point-of-purchase or on their way to a store. Here is where advertising at or close to the point purchase plays a crucial role in providing consumers with encoding-specific cues to facilitate the retrieval and recall of the information provided by the traditional advertising (Shimp, 2010:591). It is, therefore, crucial that the message and theme be sent via traditional advertising media, and that the encoding-specific cues used in retail advertising at or close to the point-of-purchase should be properly integrated to complement each other.

Retail furniture advertising at or close to the point-of-purchase provides the culmination for an IMC campaign, and increases the probability that shoppers will

select a particular brand over alternatives, or do some unplanned or impulse shopping.

Some of the latest OOH media types allow far more specific targeting and potential engagement with an audience. In the next section, these newer formats – in particular: digital- and ambient OOH advertising media – will be discussed.

4.3.4 ALTERNATIVE OOH ADVERTISING AS AN OOH ADVERTISING MEDIA PLATFORM

Alternative OOH advertising includes a variety of new unconventional media and communication channels, such as digital screens in sports bars, stadiums, interactive displays in shopping malls, advertising displayed on objects placed in unconventional unexpected contexts, such as balloons, bicycles, clothing, tee-markers on a golf course, bill folders, shopping trolleys, promotional street art, graphic-pictorial advertising, such as graffiti and chalk stencils.

This application of alternative OOH advertising is different from the other OOH advertising media platforms, such as outdoor, transit, street and retail furniture, which display static, printed, non-digital messages without the potential for editorial or supporting programme content. However, these newer channels are not like traditional or one-way OOH advertising messages without customised content or possible interaction with the audience in a specific environment. It is, therefore, categorised in a separate platform.

The two major formats in this platform are digital OOH advertising media and ambient OOH media.

4.3.4.1 Digital OOH advertising media

Digital OOH advertising media is similar to traditional outdoor advertising, but digital signage is used to display videos or electronic images on LCD, plasma, or standard television screens outside of the home. Usually, the screens show advertising, product information, or special programmes. For the purpose of this classification, screens that show only textual information or full-length network or cable-television

programmes, without any commercial content or advertising messages, are not included.

Digital OOH advertising media offers more flexibility than traditional outdoor advertising, because advertisers can quickly change or adapt their messages, or communicate up-to-date special offers, promotions and prices. The advantage of digital technology is that it also offers more creative and interactive opportunities. Innovative technological developments are constantly being tested and applied. For instance, "intelligent billboards" that detect the radiation from motor car antennas to determine the most popular radio station and adjust their messages to suit the drivers passing by.

Then there are "oscillating billboards" on top of buses that adjust messages as the bus drives from one location to another; and "sound-enabled billboards" that are equipped with a motion-sensitive infrared device that can launch a recorded message, thereby strengthening the outdoor advertisement (Emling in Lichtenthal, Yadav & Donthu, 2006:246).

Another advantage of this format is the opportunity to include animation, so that, in effect, television commercials are shown outdoors. The latest technology employed in these full-colour and large-format electronic billboards provides superb levels of brightness and resolution on the LEDs. News, weather and relevant information can also be displayed to stimulate audience interest (Provantage, 2010).

Currently, the largest digital outdoor advertising board of 40m² in South Africa is at the corner of Sandton Drive and Rivonia Road, close to Sandton City. The new technology employed here and some of the high-quality OOH advertising digital platforms can deliver colours of extraordinary brightness and contrast levels to be displayed on the screens – without the diluting influence of full sunshine, as was the case in older technology in the past (Figure 4.12).

Figure 4.13 shows an advertisement for Polo, a luxury clothing brand. The advertisement is displayed on a digital advertising screen in an upmarket shopping centre where they have a store. This is an interactive screen that allows shoppers to touch the screen for further information.

Digital mediums have also recently been introduced in the South African transit media environment, in order to entertain and inform commuters. One transit media company, Provantage, has introduced large plasma screen inside taxis, with blue-tooth technology to broadcast tailor-made programmes with the opportunity of advertising and the sponsorship of regular features.

Figure 4 12 Large digital advertising screen at Sandton

Figure 4 13: Digital OOH media in a upmarket shopping mall

Figure 4 14: Digital media at taxi ranks

Source: The Researcher, 2011; Comutanet 2010

Another company, Comutanet, offers large 12m² TV screens that are strategically placed at the largest taxi ranks in South Africa. These types of media are ideal for regional advertisers, or to allow national advertisers to customise the message. They offer an entertaining audio-visual medium; and they can even create a sense of community when commuters gather together to watch the large screen, for example, during major sporting events (Figure 4.14).

4.3.4.2 Ambient OOH advertising media

Unconventional or ambient OOH advertising can be defined as alternative OOH communication methods which employ non-traditional physical spaces or objects that are not typically designated to carry advertising messages and which are located in consumers' immediate environment (Yuen & Dacko, 2011:5). This format includes numerous and different communication formats, but what they all have in common is the fact that they allow companies to break through the advertising clutter that prevents the commercial message from reaching the consumer. Ambient OOH advertising media is usually placed in a single location, or in a limited number of public spaces, such as outdoor squares, crowded areas or access routes to shopping malls and stores. It is used where the advertised product is sold or in a context where it is likely to be considered positively (Gambetti, 2010:47).

This particular format includes a wide variety of options used for targeting specific audiences at gathering points and high-density consumer areas to advertise relevant products or services. Each of these specialised media vehicles offers advertisers unique advantages and disadvantages (Sissors & Baron, 2010:268). However the general advantage of ambient OOH media is that advertising can be placed in areas most relevant to the product or service being offered, and is ideal for supporting other advertising media to build or strengthen the associations with the theme conveyed in other media (Gambetti, 2010:47).

Therefore, the media have more meaning for audiences than advertisements placed out of context. So, from a media planning perspective, selecting the right location and the most relevant environment for ambient OOH media, and profiling the targeted audience is crucial. Ambient advertising is also less expensive than more

traditional media, and it can deliver excellent results if applied correctly (Jurca, 2010:325).

Ambient OOH media is not without its limitations. The consumers might not be interested and ignore the messages whenever they can, no matter how entertaining the surrounding content or relevant the environment. Or they might be distracted with all the other stimuli in the environment; or even worse, they might regard the advertising as intrusive rather than providing useful information. A major problem of ambient advertising is the lack of tools that can measure its effectiveness; therefore advertisers might not know what their return-on-investment is when using this type of communication (Jurca, 2010:327).

Gambetti (2010:48) also notes that ambient communication might not be successful if it is not properly integrated with the overall marketing and communication strategy, or when there is a lack of environmental contextual integration. It might also fail when the creative concept or execution is poor so that it is not able to break through the clutter, grab consumers' attention, and generate word-of-mouth, as well as when there is an exaggerated use of creativity that cannibalises the brand and merely focuses on the concept.

These ambient communication messages can be place-based, mobile, or displayed on goods used or exposed to the public. Place-based ambient OOH media encompasses a wide variety of formats that are specially placed where particular groups congregate for a variety of purposes. They can either be interior-based advertising inside stores, shopping malls, restrooms, restaurants, night clubs, classrooms; or they can be exterior-based advertising at golf courses, parking garages, petrol stations, sports stadiums, cultural events or live shows (Belch & Belch, 2012:467; Sissors & Baron; 2010:268; Turley, Shannon & Richard, 2000:323).

An example of place-based ambient OOH media can be seen in Figure 4.15. The message was placed inside the bill folders of a restaurant. This was for the introduction of a new flavour of breath fresheners. The message was appropriately delivered at Italian restaurants (with plenty of garlic dishes offered on the menu) in selected upmarket shopping malls.

Mobile ambient OOH media are not limited to specific spaces; and they can also include blimps, balloons, custom inflatables and projection media on any surface used to project a video or digital image. Advertising messages can also be displayed on goods used or displayed in public places, such as cartons, cups, confectionary packaging, postcards, shopping bags, clothes and drinking straws.

Gambetti (2010:36) classified ambient OOH media either as three-dimensional artefact-based, or four-dimensional motion-based. Three-dimensional artefact-based ambient OOH media refers to objects positioned in an unusual environment and in an unexpected milieu used for advertising; and they comprise a wide variety, such as advertising messages on shopping bags, plastic cups, handbags, furniture, water bottles, pens, magnets, key rings, bicycles, balloons, drinking straws, cool-drink cans and clothes.

Figure 4.16 illustrates an example of a three-dimensional artefact-based ambient OOH media used for a charity organisation dedicated to feeding disadvantaged children in South Africa. They placed the three-dimensional communication message at the bottom of supermarket shopping trolleys, containing instructions for how to donate food in special collection tins placed around the grocery store. The aim was not only to appeal to the emotions of the shoppers, but also to produce a change of behaviour by donating. This flexible medium allowed them to target a very specific market of high-income female shoppers at exact geographical locations in selected upmarket shopping malls.

Four-dimensional motion-based ambient media comprise all those motion-based interactive promotional initiatives used to encourage consumers to become involved and participate in the communication process, such as blue-tooth posters, touch-screen interactive panels and unconventional promotional initiatives that involve people and employ urban guerrilla techniques. This interactive communication process usually moves on to the Internet or cell-phones, where the participants express their experience of the event by sharing rumours, photos or videos on social networks.

An example of the effective use of four-dimensional motion-based ambient media can be seen in Figure 4.17. Here, the Coca-Cola 12m high Crate Man called "Crate

Fan" was originally erected in 2010 for the FIFA Soccer World Cup tournament, located at the Bascule Bridge at the V & A Waterfront in Cape Town. It now helps to celebrate the company's 125th anniversary. Recycling was a major theme of Coca-Cola's commitment to the 2010 FIFA Soccer World Cup. Coca-Cola had a competition to reward school children for collecting used cans and bottles in a major recycling drive with the emphasis on environmental awareness.

The winners received tickets to the World Cup Soccer matches, based on the number of cans and bottles they had collected. Part of this was the "Crate Fan" in Newtown, Johannesburg and the V & A Waterfront in Cape Town. The locations were selected in areas where soccer fans could photograph themselves with the "Crate Fan".

Another example of four-dimensional motion-based ambient communication is the social marketing campaign for Project Care (Figure 4.18). This focuses primarily on creating awareness of the negative impact of violence on women and children, as well as society as a whole. The first phase of this social campaign was aimed at getting the nation to think about the norms that need to change, and that continue to incite violence against women. One of several elements of this ongoing campaign was the wrapping of scaffolding structures of an entertainment stage, located at Vangate Mall in Athlone, Cape Town.

The creative message started off with the clean face of a woman, who became progressively more "beaten" over a period of days. The re-flighting of a more "beaten" face would happen every 3-4 days, with messages relating to each, such as: "If you believe she deserves this, it will just get worse"; and "If you believe it's okay to be silent about this, it will just get worse".

There was also a call to action – to sms "STOP" to a number, in order to help stop the violence. With the launching of the campaign, a main event was held at selected locations across South Africa. At each site, the building of human ribbon- by the all the spectators holding hands and standing in the form of a ribbon took - place. The red ribbon is the universal symbol of awareness and support for those living with HIV. On the day of the event, they asked everyone present to take out their cell-phones and sms "STOP" to show their support. A healthier, less-beaten-up face was

then displayed – to suggest that the support of the community had helped to heal her (Ignite idea management, 2010).

The world's largest fully functional Vuvuzela (Figure 4.19) with the message: "Hyundai Brings the Gees" was constructed for Hyundai's 2010 World Cup Soccer campaign on the well-known unfinished bridge in Cape Town. The giant Vuvuzela was blown at the start of every World Cup game, as a call to action; and it received a remarkable positive reaction, with video clips being sent all over the social network and published in the media.

The Vuvuzela is a symbol of South African supporters and the vernacular message "Hyundai Brings the Gees" basically means bring the "fun, support and goods spirit" (Jupiter drawing room, 2010).

These are some South African examples to illustrate the basic requirements for the effective use of ambient OOH media. Firstly, it should be an original creative idea that is consistent with the overall brand or IMC strategy concept and the targeted audience values. Secondly, it also needs to be an idea or concept capable of activating the audience to spread the brand message via the social networks, or other media, such as cell-phones. Lastly, it should be relevant to the context where it is placed.

Now that the different OOH advertising media types have been classified, the next section will focus specifically on international studies on the effectiveness of different OOH advertising platforms.

Figure 4.15: Place-based ambient OOH media

Figure 4. 16:Three-dimensional artefact-based- ambient OOH media

Figure 4.17: Coca-Cola's Four dimensional Crate Man at V & A waterfront

Figure 4.18: Four-dimensional motion-based ambient media for Project Care

Figure 4.19: Giant Vuvuzela for Hyundai during the FIFA World Cup 2010

Source: The Researcher, 2010, OHMSA. 2012[2] , Ignite idea management,

4.4 RESEARCH ON OOH ADVERTISING MEDIA

The OOH advertising media is one of the least researched of any mass medium (Katz, 2010:92; Veloutsou & O'Donnell, 2005:219; Wilson, 2011:59). The limited academic research – not only in outdoor advertising, but the whole range of OOH advertising media platforms – can be attributed to the costs involved with enacting field experiments, and the large surveys required to study this medium (Woodside,1990:297; Donthu & Bhargava, 1999:7).

Laboratory experiments do not effectively replicate the externalities associated with OOH advertising, such as a mobile audience's level of involvement, and other environmental distractions that can distract attention away from the media. The alternative method is to use large-scale surveys to research the consumers. This is complex and expensive, due to the extreme mobility of the audience.

Some of the limited studies published over the past two decades within each of the major platforms of OOH advertising media will be discussed in the following sections, while focusing on the key implications for the planning of media.

4.4.1 RESEARCH ON OUTDOOR ADVERTISING

Donthu *et at.* (1993) examined the influence of a number of execution factors on the recall of outdoor advertising. In this study, 142 residents of a large town in the USA were randomly selected and telephonically interviewed, to determine their level of recall of ten billboards with different advertising messages erected in a specific geographical area for the duration of this study. It was found that those factors concerning the advertising medium (position and location of the advertising board); factors concerning the creative message execution of the advertisement (contrasting colour and the length of the copy); as well as the characteristics and the behaviour of a target market (attention paid to the advertisement and attitude towards advertising) all have an influence on the level of recall of outdoor advertising.

Bhargava *et al.* (1994) collaborated with the industry to analyse the data of 282 outdoor advertising campaigns in Canada, to find ways to improve the effectiveness of outdoor advertising campaigns. This was done by examining the relationship

between recall scores and execution factors for each of these campaigns. As with the previous study, it was also found that media-related factors (higher GRPs, longer duration of the campaign) and factors concerning the creative message execution of the advertisement (overall creativity, clear illustration or visuals, copy-related aspects, such as short readable copy) all influenced the level of recall of outdoor advertising.

Some studies measured the effectiveness of outdoor advertising on a behavioural level and proved their ability to obtain sales, as opposed to merely increasing awareness, as measured by recall. For instance, Donthu and Bhargava (1999) used experimentation to investigate sales response to outdoor advertising; and they found that the number of outdoor advertising boards used in the campaign was the most important factor influencing the behavioural response, suggesting that repeated exposure (high levels or frequency) to a promotional outdoor advertising message at the right location could increase consumers' sales reaction. However, the specific location of boards and promotional messages offering some incentive also influenced the effectiveness – in terms of sales.

Taylor and Franke (2003) reported on the ability of outdoor advertising to reach a local market; and interestingly, they found it to be far more effective than other media. For this study, small local and large global advertisers in America were surveyed on their perceptions of outdoor advertising; and they found that those who use outdoor advertising believed that this medium offered unique advantages not offered by other media: specifically, to communicate information at an affordable cost, to attract new customers, and to reach a local market. Alternative local and national media were not considered as reliable substitutes for outdoor advertising by these advertisers.

Taylor *et al.* (2006) investigated the effectiveness and use of outdoor advertising from the perspective of the 348 advertisers or users of outdoor advertising. Tangible response and local presence were indicated as major reasons for using outdoor advertising. Producing a tangible consumer response implies that outdoor advertising is successful for increasing traffic to stores, as well the sales of the businesses using outdoor advertising. The local presence offered by outdoor

advertising helped local advertisers to maintain their brand presence, and served as a last reminder in close proximity to the point-of-sale.

These studies on outdoor advertising proved that it is not only effective to increase awareness; but it can also be used effectively to influence consumers on a behavioural level, especially when used as a local medium to target a specific market, close to the point-of-purchase, or when being supported by a sales promotion.

4.4.2 RESEARCH ON TRANSIT ADVERTISING

Veloutsou and O'Donnell (2005) conducted exploratory research in three areas in Scotland, on the overall attitudes and feelings towards advertising, outdoor advertising and taxi advertising from the perspective of the taxi commuters. They emphasised that there is more to the effectiveness of an advertising medium than the respondent's ability to recall the advertisement – and the subsequent short-term sales increase. Therefore, target audiences' attitudes and perceptions towards the medium and advertising also need to be taken into consideration when determining the effectiveness of an advertising medium.

These findings proved the ability of mobile transit media to deliver a message to a wide geographical market. They also found that the effectiveness of taxi advertising was dependent on the level of exposure, the area of habit (working, living and travelling) and the amount of information conveyed in the message.

Wilson and Till (2008) conducted a study on the effectiveness of airport advertising media in New York City's La Guardia Airport, using observation to explore how air travellers interact with this type of transit media, in addition to surveys to measure the recall and recognition of airport advertising. The impact of the locations of the advertisements in the airport terminals was assessed based on the level of exposure to travellers.

The study assessed how the size and shapes of the advertising formats, the themes used in the messages, as well the number of words in the copy, influenced the recall and recognition by the respondents.

The findings confirmed the importance of the "less is more" principle of using a simple message with fewer words, rather than longer and more complex copy for effective advertising messages in the transit environment. This also suggests that placing advertisements on unusual or unique media vehicles and the use of context-related themes (such as destinations or airport-related themes for airport media) in the message increase the level of processing of information by the audience.

The use of context-related themes draws on consumers associations and relevant knowledge, which, in turn, facilitates learning and the recall of information or messages. It implies that the effectiveness of the message can be improved – not only by using simple short messages, but also by using one that is relevant to the context or the environment, and placing it in unique advertising formats, such as an unusual shape.

The study also considered the level of message involvement of the audience and the amount of dwelling time in transit environment and advice that that the messages, the exact locations of the advertising media, the dwelling time and the activities or frame-of-mind of the audience should be considered, when planning transport advertising campaigns. It was revealed that the use of relevant messages placed in appropriate locations with longer dwelling times and less distracting stimuli help to increase the effectiveness of transport airport media advertising.

The findings of this study are probably also applicable to other OOH advertising media in other environments, such as roadside, retail and leisure.

4.4.3 RESEARCH ON STREET AND RETAIL FURNITURE ADVERTISING

Gombeski, Miller and Levine (1990) explored the effectiveness of street-pole advertising to increase public awareness of a children's hospital for the residents in a specific town. The studied used pre- and post-measurement of awareness levels, by phoning the respondents before and after exposure. The results of the follow-up survey showed significant increases in the levels of awareness, as well as some increase in consumers' preference for the advertised hospital. It was suggested that a local medium, such as street-pole advertisements, could achieve more than just increasing the awareness on a cognitive level, but could also influence brand preference for the advertised brand.

Berneman and Kasparian (2003) investigated the effectiveness of poster advertising to promote cultural events for visitors. They used recall tests, by showing the videos of a street in a city with a number of posters of different cultural events to a focus group of respondents. The respondents were asked afterwards to recall the type of events that the posters had advertised. The study found that recall is positively affected by the number of exposures, and negatively by the number of posters per exposure. This suggests that higher levels of frequency and lower competitive advertising could increase the recall of OOH advertising messages.

Both these two studies indicated that smaller OOH advertising media are especially effective for targeting specific geographical areas, such as the residents in a town or the visitors to a cultural event. It also showed once again the ability of OOH advertising media to be used on a cognitive level to increase awareness, as well as on the affective level to influence purchase intention or brand preference.

4.4.4 RESEARCH ON ALTERNATIVE OOH ADVERTISING MEDIA

Turley and Shannon (2000) explored the effects of digital advertising signs in a sports arena on message recall, purchase intentions, and actual purchase behaviour of spectators using surveys. It was found that people in a captive environment, such as a sports arena, do notice the advertisements, but they do not process very many of them. The spectators interviewed could recall at least some of the advertisements

to which they had been exposed in these captive situations, but most could not produce any lasting recall of the message.

It was suggested that all the distracting clutter in the environment had a negative impact on the effectiveness of the medium, and that the actual purchasing of a product as a result of advertising exposure in a sports facility was rather low.

Another factor that influenced the effectiveness of the advertising in this context was the frequency of exposure to the advertising message. The frequency of exposure to the advertisements had the largest impact on recall, suggesting that advertisers should rather advertise more often, to achieve maximum levels of recall and effectiveness, especially in a cluttered environment.

More recently, Eun and Kim (2009) used survey research to explore how consumers respond toward digitally interactive bus-shelter advertising on a cognitive and affective level. It was found that digital interactive bus-shelter advertising – using physical sensors or touch screens to create two-way interactive communication with commuters – resulted in interaction with the audience, by offering them entertainment and information, while they were waiting for a bus.

The results revealed that the visual impact and creative concept of this type of OOH advertising media format had a larger impact on the affective dimensions and attitudes of these consumers than on their cognitive responses or retention of the information.

4.5   CONCLUSION

An analysis of the existing academic and advertising media industry literature has revealed some differences and similarities with regard to OOH advertising media. It has also revealed the lack of any proper classification scheme for the whole new range of media options in South Africa. For that reason, this classification was proposed and discussed. This classification scheme for South Africa categorised and compared the wide range of media-platform formats and vehicles was intended to reach consumers outside their home.

Four major platforms, each comprising a variety of formats and vehicles in different OOH media environments were presented. These four platforms include outdoor advertising; transit media advertising; street and retail furniture advertising; and digital and ambient OOH media channels. These platforms can be found on the roadside, retail, leisure, transport, or in a number of other specific locations, or in venues, such as at public health clinics, public toilets, sports stadiums, golf courses and petrol stations.

While traditional outdoor advertising and transit advertising media can reach large numbers of people, other platforms, such as street and retail furniture, digital and ambient OOH media offer more specific targeting of selected groups, and offer a higher level of potential engagement. Therefore, a combination of these formats should be able to deliver excellent results. A better understanding and knowledge of these formats could help marketers with new strategies to convey their message to consumers, who could not be reached effectively by other media closer to the point-of-purchase, and to reinforce, or to support the message conveyed in an overall IMC plan.

Some international studies on the major OOH advertising media platforms were found to have key implications for the planning of media. They were thus also reviewed. However, none of these studies addressed the potential synergy and integration between the different OOH advertising media platforms or formats.