CHAPTER 6: QUALITATIVE INSIGHTS FROM IN-DEPTH INTERVIEWS WITH OOH ADVERTISING MEDIA SPECIALISTS

"Getting there is half the fun"
Slogan for Cunard steamship line in the 1950s

Research objective to be addressed:

To explore the planning and integration of OOH advertising media, as part of an overall IMC campaign by OOH specialists in South Africa.

6.1   INTRODUCTION

In the previous chapter the research methodology was presented. To recapitulate, the ten participants in this study were OOH advertising media specialists from four of the five OOH advertising media-specialist agencies operating in South Africa (Posterscope, Kinetics Worldwide, Intouchoutdoor and Outdoor exchange) and two of the largest media-only agencies with specialized OOH advertising media divisions (The Mediashop and Mediacom). These specialists were deliberately included in the study because of their level of experience in the planning of the whole range of OOH advertising media platforms.

In this chapter, the conceptual networks that embody the findings and insights obtained from the in-depth interviews with these selected specialists in South Africa will be presented – in order to understand their way of planning OOH advertising media, as part of a larger IMC plan. These insights, together with the information from an extensive review of the relevant literature, will be used to develop a framework for the planning and integration of OOH advertising media in South Africa. This will be further discussed in the last chapter of the thesis.

Several acceptable models exist to structure or organise a qualitative report, including chronology, life-history, themes, composites, critical events, zoom lens and portraits. For this study, the conceptual networks with meaningful themes that emerged from the data analyses were used to report the findings. In the following
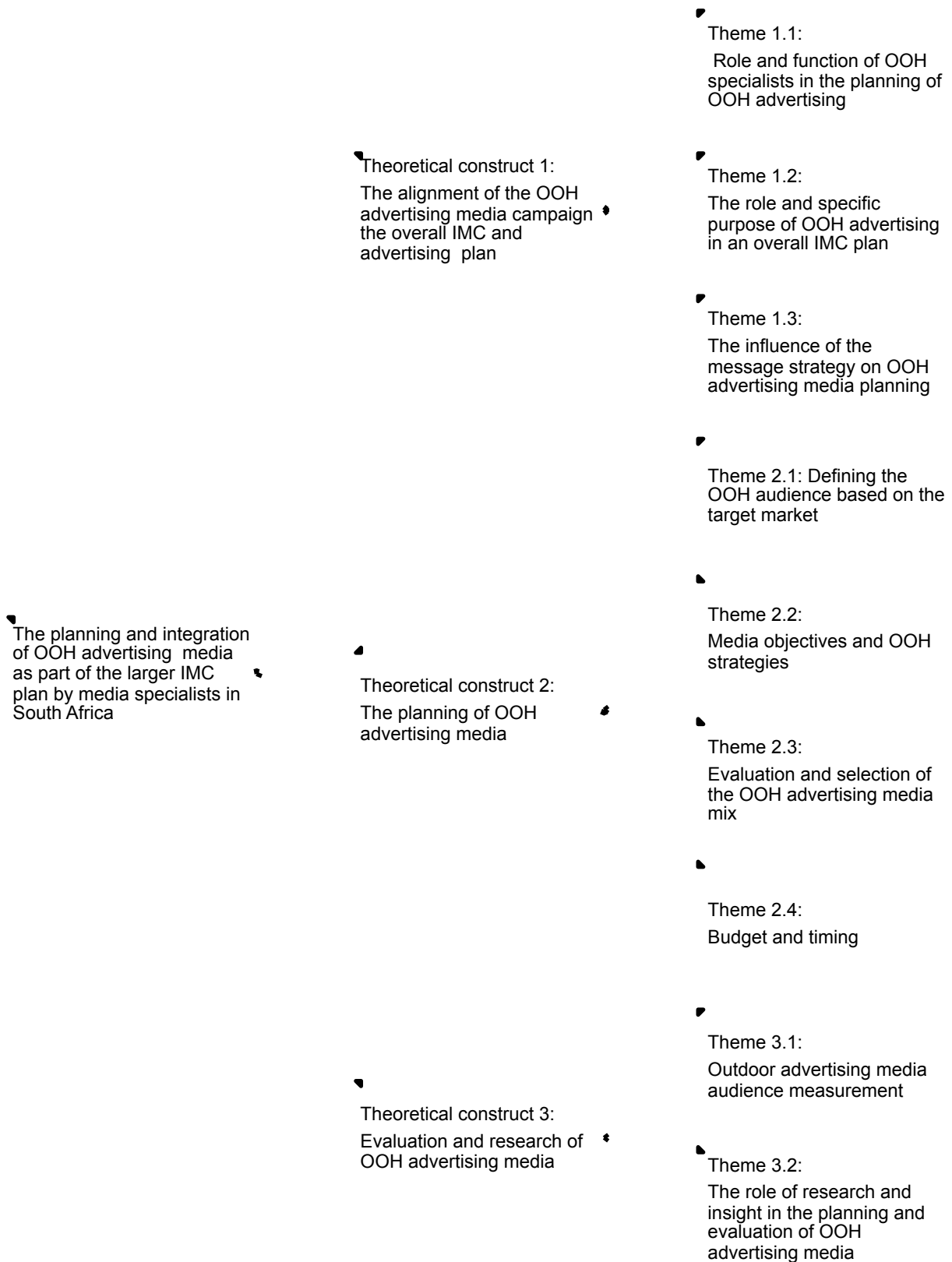
sections, the discussion of the insights obtained from the qualitative analysis of the interviews will be done, according to three theoretical constructs. A schematic overview of the three conceptual networks and the related themes that encapsulate the overall findings of this study can be seen in Figure 6.1. The first conceptual network deals with the alignment of the OOH advertising media campaign with the overall IMC plan; the second deals with the planning of the OOH advertising media; while the third deals with the evaluation and research of OOH advertising media.

In the remainder of the chapter, the themes within the conceptual networks will be discussed in detail. For all these themes the specialist's point of view will be discussed and interpreted by referring to the related themes and categories. The implications of the results in this chapter were either mentioned by the participants or derived from the data by the researcher. When a verbatim quotation of the OOH advertising media specialists' responses is used, it is indicated with quotation marks and identified by the number of the participant. For example, "P1" means participant 1, and "P2" refers to participant 2, and so one. When words were added in the verbatim quotations to enhance their understanding, this was indicated by putting the inserted words in parenthesis: (...).

The themes found in the overall process of OOH advertising media planning and integration will be displayed visually in the form of conceptual networks or diagrams – to illustrate the hierarchical relationship between the various themes (indicated by CF) and categories.

In the following sections, the three illustrated conceptual networks will be presented; and the results and their interpretation will be discussed. In each of the cases, the discussion will commence with the first theme on top, while the related categories will be discussed clockwise, starting with the one closest to the theme. The same sequence and process will also be followed when discussing the other two conceptual networks. The order of the hierarchy is: construct – theme – category (see Figures 6.2, 6.3 and 6.4), and then the verbatim quotations, which served as evidence in the discussion of the categories.

Figure 6 1: Theoretical constructs and related themes

The planning and integration of OOH advertising media as part of the larger IMC plan by media specialists in South Africa

Theoretical construct 1:

The alignment of the OOH advertising media campaign the overall IMC and advertising plan

Theme 1.1:

Role and function of OOH specialists in the planning of OOH advertising

Theme 1.2:

The role and specific purpose of OOH advertising in an overall IMC plan

Theme 1.3:

The influence of the message strategy on OOH advertising media planning

Theoretical construct 2:

The planning of OOH advertising media

Theme 2.1: Defining the OOH audience based on the target market

Theme 2.2:

Media objectives and OOH strategies

Theme 2.3:

Evaluation and selection of the OOH advertising media mix

Theme 2.4:

Budget and timing

Theoretical construct 3:

Evaluation and research of OOH advertising media

Theme 3.1:

Outdoor advertising media audience measurement

Theme 3.2:

The role of research and insight in the planning and evaluation of OOH advertising media

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6.2 THEORETICAL CONSTRUCT 1: THE ALIGNMENT OF THE OOH ADVERTISING MEDIA CAMPAIGN WITH THE OVERALL IMC- AND ADVERTISING PLAN

The alignment of the OOH advertising media campaign with the overall IMC and advertising plan is the first of three theoretical constructs, which will guide the discussion of the findings of this study. The three themes within this construct: the role and function of OOH advertising media specialists in the planning of OOH advertising media as part of overall IMC plan; the role and specific purpose of the OOH advertising in the overall IMC plan; and the influence of the message strategy on OOH advertising media planning – as well as the relevant categories within each of these themes – are displayed in Figure 6.2, and will be discussed in the sections to follow.

Figure 6 2: **Conceptual network of the alignment of the OOH advertising media campaign with the overall IMC plan**
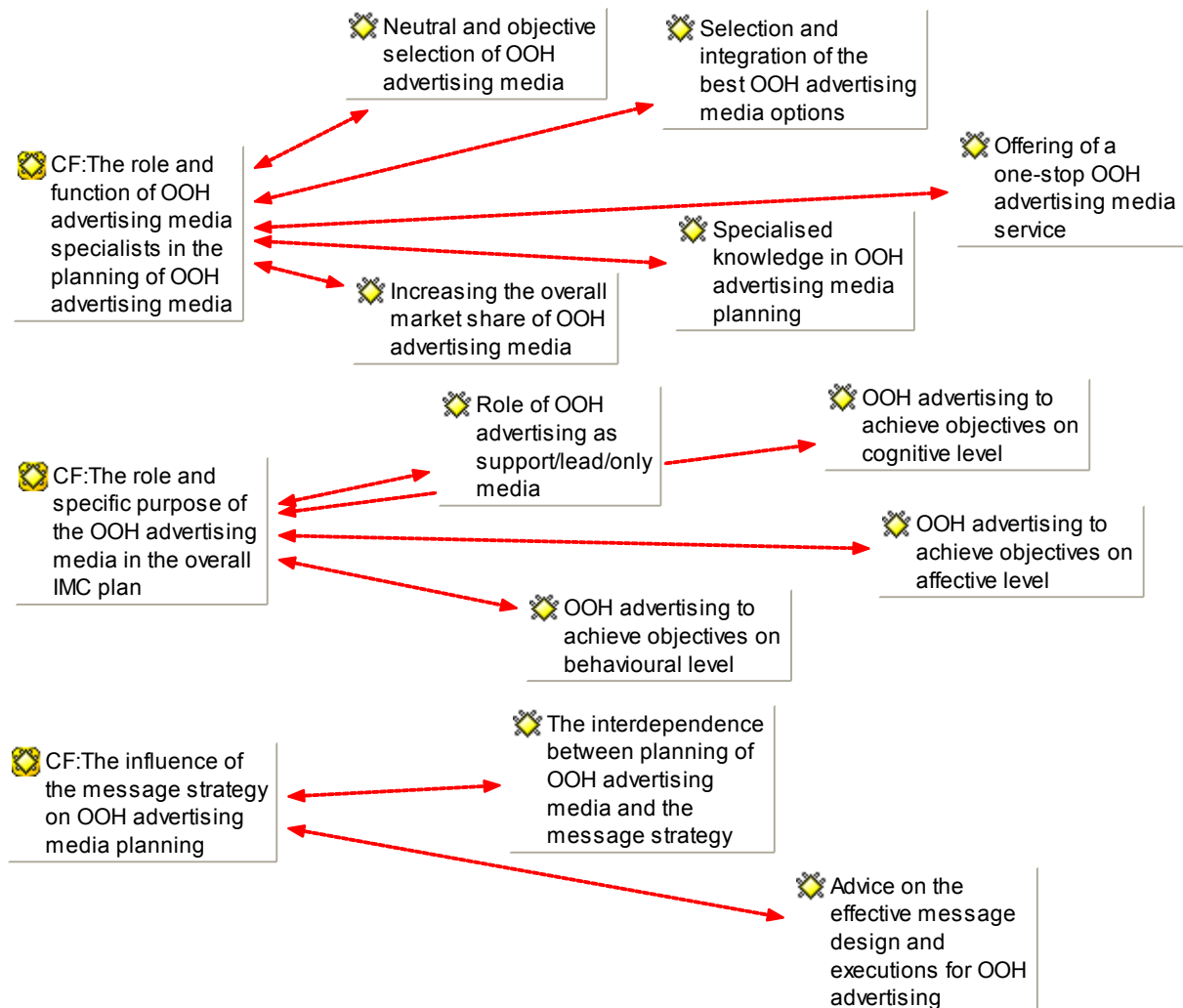
6.2.1. THEME 1.1: THE ROLE AND FUNCTION OF OOH ADVERTISING MEDIA SPECIALISTS IN THE PLANNING OF OOH ADVERTISING MEDIA

Five roles or functions of OOH advertising media specialists in the planning of OOH advertising media, as part of the overall IMC plan could be distinguished.

6.2.1.1   Neutral and objective selection of OOH advertising media

The majority of the OOH advertising media specialists were of the opinion that their objective assessment of OOH advertising media offered by various small and large OOH media companies helps to facilitate the unbiased comparison and selection of the best available OOH advertising media options for their clients: "*We don't have preferred media owners over others. We evaluate all their offerings via an external auditor. All sites are evaluated, depending on where the sites are, which target markets they reach, if they are visible and in a good condition*" (P4).

A few of them also emphasised that their choice of OOH advertising media platforms and vehicles for a campaign is not biased towards large media owners or types, prejudiced or predisposed towards any particular outcome – apart from the campaign objectives. They also claimed a neutral position and objectivity towards media owners: "*So far, we can stand up and say: 'Take your pick without being in favour of certain companies that we are aligned to"* (P1).

6.2.1.2   Selection and integration of the best OOH advertising media options

Most of the OOH advertising media specialists made some remarks about the important roles that they play in the evaluation and integration of all the various OOH advertising media platforms, such as "*outdoor, commuter media, digital billboards, mall media or even to create another solution*" (P3) in an overall campaign – in order to offer advertisers an integrated OOH advertising media solution.

A few explained that they act as integrators, or the link, between the large number and variety of OOH media companies providers offering or selling different media to the advertisers or agencies. One participant explained that they establish "*contact with all the many contractors (OOH media companies) who own outdoor media, in*

order to integrate the information from a wide perspective". This was not the case in the past, when: "*You will have taxi advertising, you have bus shelters and you have roadside billboards, and never the three shall meet, because they run the separate division and are after the same money... and were not often integrated*". However, specialists were of the opinion that they had been able to change this, for example "*...with independent companies, like me, coming in to actually integrate all the types*" (P9).

6.2.1.3   Offering of a one-stop OOH advertising media service

A number of specialists noted that the service offered by them resulted in a one-stop service to advertisers and their agencies: From media planning, strategy buying to post-campaign inspection. They indicated that this constitutes a valuable service for their clients, as illustrated by the comments: "*We are like their single point of contact* (P4), and "*They love the fact that they don't have to deal with all these millions of people...We give them such insight too: Is the site good? Is it not good? Will it work with the strategy?*"(P5)

Another noted that this type of service is now available for "…*small advertisers looking for tactical campaigns or for large clients with complex national campaigns*" (P7). Specialists can help those in need of wide national reach across South Africa, or smaller local businesses that might only need specific geographical reach close to their outlet. The result is a campaign where the best media options are not dependent on certain OOH media companies, but the media options can be compared, and the best options are then selected to meet the specific objective of a client.

Some specialists also emphasised that their services extend beyond the planning of traditional outdoor advertising media, but they could also help advertisers or agencies requiring other OOH advertising media platforms for their campaigns, such as transit or ambient media. For example, one participant explained that when it is necessary to meet the objectives of a unique campaign they can make use of "…*a company specializing in the ambient OOH platforms*" (P3).

6.2.1.4 Specialised knowledge in OOH advertising media planning

These OOH advertising media specialists were of the opinion that they offer specialised knowledge and insight when it comes to planning OOH advertising media strategies, compared with general media strategists, because they "*specialise in out-of-home*" (P3).

OOH advertising media specialists offered various reasons for why they plan effective OOH advertising media strategies. Some suggested that if OOH advertising media is planned by "*…general media people, there is not really a good strategy behind out-of-home*" (P4).

Others claimed that they have a better understanding of the OOH advertising media options available, because they "*…are updated about all the new media*" (P8), and that they have actual experience of the physical environment, because they "*…go on site trips, which no other media strategists will do in a media agency*" (P5).

6.2.1.5 Increasing the overall market share of OOH advertising media

A minority of these OOH advertising media specialists also regard their role in the industry as being to increase the overall OOH advertising media share in South Africa. They regarded education and training as successful methods to increase the market share: "*We educate our clients and agencies and advertisers about all the OOH media types available in the market, so that they know what their options are*" (*P8*).

Some also confirmed their instructive role in the industry with regard to OOH advertising media planning, by not only focusing on the media-planning side, but also enlightening the industry on how to maximise the creative execution of OOH advertising design: "*...it is just kind of educating people... we often do agency workshops and creative workshops and things like that with them to educate them on the value and the importance of out-of-home as their campaign*" (P5).

6.2.2. THEME 1.2: THE ROLE AND SPECIFIC PURPOSE OF OOH ADVERTISING IN AN OVERALL IMC PLAN

One of the primary issues linking the overall IMC plan and OOH advertising media campaign was the role and specific purpose that OOH advertising play in the larger IMC plan.

6.2.2.1 The role of OOH advertising media as support, lead or only media

In general, the participants agreed that the OOH advertising media are employed as just one of one several elements in an overall IMC plan: *"OOH is only one component of the larger campaign in most cases. It is very seldom that we come across campaigns that are exclusively OOH"* (P10).

OOH advertising in an overall IMC plan seems to predominantly play a supportive role in the overall plan of national advertisers. One participant noted that the role *"will depend on the client's objective, but generally outdoor is the support"* (P6). Another confirmed this and added that: *"OOH can also be used for stuff like branding and sales, often as support with other media, or even below-the line activities"* (P2). OOH advertising as a support medium in an overall IMC plan is then typically used to reinforce the theme or message conveyed by the primary media (such as television or print or radio), or to deliver the message to selected market segments that are not reached as effectively by the primary medium. In these cases larger outdoor advertising formats would typically be used.

> *"We can develop an outdoor strategy that will connect to that overall campaign by just supporting the television campaign and just reiterate the message that they are communicating on television, so that the audience get the message more than in one environment to help them remember. Outdoor then has got to start at the same time because you want everyone to be seeing the television ads, hearing the radio, seeing the outdoor."(P3)*

> *"It will make the person recognise the logo or the brand; so they will say: Hang on, I have seen this company, yeah they are actually on that road, and I wonder what it's all about... I think it works very well with radio also. ... So the print ad is used for launching the new products, they don't do it on the billboards. The billboards only show their brand name and show a good photo, just that. That works, but when a person opens a newspaper, they will recognize the logo from the billboards, and will be more likely to be more interested in what they have to offer" (P9).*

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"If you are doing a campaign on radio, in certain areas, you can either support this campaign with outdoor, in exactly those areas for when people drive in their cars ... or you can use it where there isn't a radio station; then you use it to market the product in that area." (P6)

However, it was also revealed that OOH advertising can play a leading role as a directional medium. In this regard, several specialists noted that it is possible to use OOH advertising as a directional medium close to the point of purchase for large national advertisers to act as a last-minute reminder before consumers make final buying decisions.

In these cases, campaign outdoor advertising media, street and retail furniture or place-based media in shopping centres within the targeted areas, would often be used.

"Outdoor is very effective if you want to reach shoppers, then we will go for close to point of purchase, we'll focus on shopping centres, mall activations, and promotion. Another option is to use a billboard as you enter the mall area or parking lot in the mall or the pillars" (P6).

"Let's say we want wash room advertising to target female shoppers in Gauteng, we will contact the guys do wash room advertising in shopping centres" (P1).

Some participants pointed out that for smaller local advertisers, typically with a smaller budget, OOH advertising is also used as directional medium to get traffic to their store. In this case, OOH advertising is not only the primary medium, but often the one and only advertising medium used by these smaller businesses to reach a local market close to their business outlets.

They would then typically advertise on smaller media formats located close to their businesses, such as street-pole advertisements or advertising on a bridge, as illustrated by the quotations below.

"It depends on how big the client is. I had a small client, a local fresh produce store and they wanted to advertise for the first time. But they didn't have the budget to do television or radio so we work out a solution for them only using smaller outdoor. We selected a couple of street poles for them as tactical advertising. ...With bigger clients, they can afford more and then outdoor will often form part of their larger strategy. For example if there is an ad campaign running on television it will usually be combined with billboards repeating and supporting the message of the TV campaign. Outdoor plays an important part as support medium but can have huge impact on

its own. Increasingly we see that clients realize that outdoor can also take the lead nowadays, especially to target shoppers" (P8).

"As simple as that, like Paul Wilkins Smith has one store (a smaller men's boutique), and he advertises around here (Sandton/Johannesburg), like Parkers, but he has only one store and he advertises all around these suburbs. So we look at the consumer's purchase cycle and the client's stock cycle, that's when the new stock comes in. Grayston Bridge for example is perfect for outdoor for a local clothing store. He also wants more shop windows, so that's what he's doing and he can't afford the same as some larger stores in Jo'burg or television. For international or larger clients I will try and get impact down the street, like those MTN ones (large super size outdoor advertising) down from the Airport" (P2).

6.2.2.2 The specific purpose of OOH advertising on cognitive, affective or behavioural levels

Most participants have emphasised that the first point of departure in planning any campaign on the OOH media plan is to consider the overall marketing communication objectives and strategy, because these run through the campaign like a golden thread; and they would determine the OOH media audience and the media to be used. The overall marketing and communication objectives and plan of advertisers are established by their marketers and advertising agencies – not by these specialists, but they have to reaffirm and clarify the overall goals, since these goals would influence their media-planning decisions.

"So whatever the main objective is, will determine then how the campaign is planned" (P6).

"Only once the overall strategy has been developed, will we get a brief to say….Outdoor will be a component and these are the objectives; then we revert – saying these formats are going to work best to achieve what you want to achieve" (P10).

"In the case of an agency booking they liaise with the client (advertiser) to determine what their past sales have been like; where they are missing out in the market; how they are going to achieve a better reach; or haven't they impacted the audience enough, so that people are aware of their brand. They also have to decide: Do we need to expand our market, or do we need to re-introduce the product to the current market? We (specialist and agencies) also need to understand each other. And we need to ask these questions if they do not give it to us that we can provide or even suggest the best outdoor solutions" (P8).

"It all depends on what they want to achieve.... It all depends on what the objective is" (P3).

In the discussion with the participants, it was also revealed that OOH advertising was employed to reach different marketing communication objectives in the overall IMC plan. Although OOH advertising was often used to create and maintain brand awareness: "*Traditionally, yes, it is known as a branding medium or top-of-mind awareness medium. That is still the main reason how we would be use it*" (P9). It was also used for more than just obtaining awareness or knowledge, such as creating a brand image: "…*to build the brand image or create impact for a new product*" (P1), or to create positive brand feelings and experiences for consumers when the "...*the media objective is to create completely a new, fun, extreme-brand experience*" (P5) and to obtain behavioural responses.

Suggestions on how OOH advertising can be employed to help achieve marketing communication objectives on three levels will be discussed in the following sections.

- **OOH advertising to achieve marketing communication objectives on a cognitive level**

Some suggestions on how OOH advertising can be used to achieve marketing communication objectives on the cognitive level could be made, especially:

Create instantaneous awareness when launching new brands by using OOH advertising media that reach a mass market to create brand, awareness, recognition and recall by providing a continuous, repetitive presence of the brand message 24 hours-a-day, 7 days-a-week.

> "*You can have an awareness campaign; if you are launching a new product, you want to be everywhere, so that everyone knows that this brand is out there, and that on its own is a very good way of doing it; it is very cost effective compared to TV*" (P3).

> "*…to increase awareness, to communicate certain aspects about a brand*" (P2).

> "*Allocate that to one big billboard and place it on a busy intersection, a lot of people will know about your business, because everyone has to stop at that intersection*" (P8).

Maintain top-of-the-mind awareness for existing brands, by using a simple repetitive message or strong visual branding to remind consumers about the key features of

the brand, such as the packaging or the logo. This helps the audience to make associations in their mind with the key attributes and the brand name, and vice versa.

"…like Brandhouse brands for example - Heineken, Amstel - that is a support function, where it is literally a branding message just with their products on large outdoor – just to keep the brand awareness out there" (P4).

"What you have to keep up that awareness and the brand information coming through.... Outdoor is a good media to get awareness, because it should have simple messages. For example, there is a big sign on the corner with a Sony with 3D television, You know it's there and you know the brand...but you have to keep up that awareness and the brand information coming through" (P2).

Inform prospective consumers about the key product features, by conveying brief factual information to a broad audience combined with direct response or sales promotion, to drive them to other media, such as a website where more detailed information can be provided or follow-up can be done.

"They would have the information of the new product they were launching...so, it was generally focused on the target market, a little bit younger, but they wanted to do something fun to engage with them and drive them to the website (using a promotion), so that they could get that knowledge and the communication and a lot of the times they actually see the campaign; and that was very knowledge-driven. They really wanted their clients to understand the product, to understand what services they offer. They didn't just want to do a branding job" (P4).

- **OOH advertising to achieve marketing communication objectives on an affective level**

Several approaches on how OOH advertising can be used to create or strengthen positive associations with the brand, could be identified, especially:

Build or enhance the brand image, using large and iconic OOH advertising media formats (such as large building or construction wraps, super signs or spectaculars, sky branding) at carefully selected locations to add importance and project an image of authority for the brand.

"... through impact, that is going to announce the new Peugeot, as new big player on market, but to a limited audience – which obviously only requires one really big spectacular sign" (P1).

"Brand building is a specific objective that an advertiser will seek to achieve. Brand building – Omo for example – they will use larger billboards in township areas, because their competitors like Mac

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would be on smaller billboards. You try to establish the strength of your brand, as opposed to just making people aware that it is still on the market" (P10).

Strengthen positive associations with the brand, by capitalising on the size of large premium OOH advertising media formats – to create a strong visual brand presence in selected areas used in the longer term.

> *"Quite often it is a brand building exercise, in which you want to promote the bigness of your brand, that you are the market leader. Bigger in outdoors is often better. Certainly, if you want to achieve impact and build brand stature, you have to go big and you have to make a statement. A good example would be the Ponte-building... which is owned by Vodacom. They have the prime cuts of the Johannesburg outdoor real estate market in terms of getting stature. You will always see them there. If you want to achieve impact that is the route to go" (P10).*

Improve the status or image of a brand and offer a prestige level that other media cannot easily match, by using the size and impact of OOH advertising, to instil brand preference.

> *"You can place a rather inexpensive brand or product on a big billboard and give the perception of a good strong reliable brand, because it is so big and visual. You can create a specific idea about a brand" (P7).*

Employ long-term brand building strategies by using OOH advertising media in combination with other traditional-above-the-line advertising, such as television, radio and print. Synergy can be then achieved; for example, when more detailed messages are presented in print, a visual message by television, audio visual or radio.

The role of OOH advertising is then to create or strengthen positive associations with the brand, by using high-impact iconic media types to portray the power of the brand.

> *"This is also why the biggest portion of our clients is people with a marketing consciousness, where they know that this is brand building. They would have a strategy, whereby the billboards, will have a single strong message, and this is critical in billboard advertising, and they would support that with a radio and TV with more detail, and with newsworthy PR. The outdoors would stay for consistent, repetitive, brand messaging for impact" (P9).*

> *"If they want to be perceived as a big brand, just using TV and radio won't do it. But you go and brand a tall building in the middle of the CBD, or you brand the Gautrain; people will perceive you as a big brand" (P3).*

Affect the feelings and evaluations of the advertised brand positively and give the brand meaning by placing the brand message in a desirable environment and relevant context.

"Some brands do. SAB for example, often use billboards at the entrances to townships to welcome people back to the township." (P10)

"I am working with a brand of watches at the moment that specifically targets high LSM. The cheapest watch is R14 000, so it's a high-end product. Then you start leaning towards certain shopping centres, very exclusive shopping centres. The reason why I'm moving immediately away from roads into shopping centres is also because of image; certain products have certain images to uphold and yes, you can put it on the M1 in Sandton, in which you are hitting your broad audience, but not when your aim is an upmarket image. So your product visual or branding must be displayed at the best suitable area, as well as the surrounding environment. You could be dealing with a client doing mass marketing and advertising; for example Vodacom, but they are aspiring to the higher end, because of income and so one. They will go next to the highways; it is not that important that it's a 100% neat around their billboards, so you will put them on the N1" (P9).

Avoid using OOH advertising media types, or advertising in environments that are not complimentary to the brand image of the product being advertised.

"…with a perfume you go for quality-looking architecture, you can't have it on a taxi. The medium is the message … If the outdoor site is in the middle of a rubbish dump, (the brand) looks like rubbish. You need a high quality site" (P2).

"Not all clients want to advertise on taxis; because I think there is a hesitation by some of the decision-makers to associate their brand with a vehicle that they have often experienced on the road as being an irresponsible road user. I know what we have found in the past is a complaint has come through – this has happened before, a consumer on the road sees a taxi driving badly and it is carrying the advertising of one specific brand, they have called the client and said that they will not be supporting your brand because it is advertised on a taxi that has been driving badly" (P10).

"If you go out on Atterbury, there is an Outdoor network site close to the Fairy Glen Medical Centre; and it is a pity. It looks bad because it has got an aluminium frame, but you can start seeing fraying at the edges. Not well maintained, not high-quality so not ideal for any good brand" (P10).

- **OOH advertising to achieve marketing communication objectives on behavioural level**

OOH advertising was not only used to obtain communication objectives on cognitive and affective levels; but it was also used to achieve marketing or behavioural objectives, such as conversion, brand-switching, trial of a new product or sales.

A number of strategies on how to employ OOH advertising to influence the behaviour of consumers could also be identified. These strategies could be divided into two types, namely: to target a specific target audience, or for promotional use.

Firstly, strategies dealing with the selection of the best location or OOH media mix suitable to reach the specific audience targeted, as seen in the examples to follow.

Persuade the target audience to consider the product or to purchase a specific brand by targeting prospective shoppers at the outlets where the brands are actually sold, and by selecting appropriate OOH advertising media formats in close proximity to where purchase decisions are likely to be made.

> *"You are going on to a store and you have usually got a set brand that you are going to buy, and the biggest brand exhibition happens in store. Really huge, you must communicate while they are in the mood to buy. If you want to achieve trial for a new product, you are obviously going to offer a decent price or a great offering of some kind or value packs or whatever it is, no outdoor can do that alone. To get trial is very important because once you succeeded in that and somebody likes it they will re-purchase it" (P8).*

Reach a very specific target audience close to purchase or consumption occasion at likely consumptions and convergence areas, based on an understanding of their travel-and-consumption patterns, and by selecting the most advantageous range of OOH advertising media platforms and formats in these environments.

> *"OK, so we knew we wanted to increase sales Lipton Ice Tea so we decided to do it in the summer; and we identified key consumption areas in the outdoor environment, and used a lot of OOH formats to create a dominant brand presence; and we got a wonderful 200% increase in sales"(P5).*

It was also clear that OOH advertising can be combined with sales promotion and other direct response media to obtain a behavioural response. The second type of strategy was related to the use of the OOH advertising for promotional purposes; and it includes the following options:

Promote immediate response from the audience by employing a specific persuasive promotional message, offering an incentive that draws people's attention and entices them to react.

> "For sales – your message needs to be very specific....If you do not have a good creative message up, it is not going to work, it is going to get lost; people are going to ignore the billboard. The thing is, billboards may be free to view and they may be on display 24-hours a day, but that does not necessarily mean that people will look at them if it doesn't get their attention. You have to offer your market something specific to react and now" (P10).

Increase sales response by combining OOH advertising at or close to the point-of-purchase, with below-the-line sales promotion activities at the specific distribution outlets.

> "If you want to increase the sales numbers, outdoors is ideal for tactical campaigns. An example would be to advertise at garages, on strollers at shop, and then combine it with activations (promotional offers)" (P7).

Persuade the audience to take immediate action by utilising a combination of OOH advertising and online or direct response media to obtain feedback, as a follow-up mechanism, such as a competition, promotions, toll-free numbers, CR Codes or website addresses.

> "From a sales drive point of view, it comes down to the creative strategy to convince. For example, if the platform is there and if you just put up a brand and nothing else, people won't know where to find it or what to do next. In the UK, they did very well with creating actions or sales. They would put the website addresses on and urge the people to go there to get something for free" (P3).

> "I can give you another example of activation: There was one bright billboard campaign for a financial institution that had a sms near it at the bottom with an opportunity to react" (P8).

However, some specialists commented that OOH advertising cannot be used as often as they are used overseas, to create direct sales – specifically from pedestrians who are moving more slowly, and who visit stores in close proximity after seeing an

advertisement – compared with the drivers of cars. OOH advertising targeting pedestrians allows relatively more detailed and direct messages compared with outdoor advertising on highways and on main arterial routes aimed at fast-moving traffic, where the message has to be very simple and straightforward, yet powerful and attention-grabbing.

> *"The difference is in SA, we don't have a walking culture, like in London, where people are always on their feet. Here, you can't really follow the signs to the nearest McDonalds. So, it is pointless to put too much information on a billboard on the highway. As you don't have time to read it. Out-of-home in South Africa is also different than in Europe; for example, because of the culture. We don't have walk-in, coffee and tube culture like you have in Europe….and also we do not have all the digital advertising that they have overseas. However, this will change over time with the Gautrain and the bus services coming in"* (P3).

- **Combining OOH advertising media to achieve objectives across levels**

It was also evident that different OOH advertising media platforms and other IMC elements are used synergistically to achieve different communication objectives across the consumers' response hierarchy, when targeting different consumer segments, each at different stages in the decision-making process, in order to move them across from lower levels, such as awareness to positive attitudes and sales. The selected quotations below serve as examples of OOH advertising media campaigns, using a combination of OOH advertising media platforms, formats and other IMC elements that can be used to achieve this driving of the consumer from lower response levels to higher levels of response, such as sales, or contacting the company by calling a number or clicking on their websites.

The first example reveals how a combination of outdoor advertising, shopping-mall media, ambient OOH media, mall promotions, competitions – as well as online media, were combined synergistically, in order to create awareness, to convey knowledge, to engage with the consumers, by offering them an entertaining personal experience, as well as driving them to direct response media platforms to request more information. This illustrates how OOH advertising can be used to create awareness amongst specific audiences combined with below-the-line promotion and online media, which offer a more personalised and two-way communication to those who show some interest in the offering.

"We did a campaign for Sanlam that was very knowledge-driven. They really wanted their clients to understand the product, to understand what services they offered. They didn't just want to do a basic branding job ...we booked (shopping) mall space, and we got boards made where you would stand, put your face through and then you would be like a diver or you would be an astronaut. Just think – like you know you could be so much better by investing in ... and while you were doing that we were having a photo taken and then you were driven to the website; you know you must go to the website, you can see your photo on the website, here is our card and then the promoters would say: "This is what you can win." There has got to be some sort of incentive. They would have more detailed information of the new product they were launching and just what (the company) had to offer. So, it was generally focused on a target market, a little bit younger, but they wanted to do something fun to engage with them and drive them to the website, so that they could get that knowledge and the communication" (P4).

In the next example, brand awareness for the corporate brand (KFC/Spur/Hi-Fi Corp) was maintained by using large outdoor advertising boards located on highways that reach a broad audience, while street-furniture advertising located at specific points close to the outlets can be employed, in order to direct the local residents in the area to the closest store/outlet in the specific area, for instance specific KFC/Spur outlets or Hi-Fi Corp stores in each suburb.

"So you would have a certain company, such as Spur, or an outlet, such as the High Fi corporation, ... so you would place a billboard on that highway and also smaller formats with directional indicators in the area of their franchises offering promotions. Lots of fast-food brands do that also, like McDonalds does that very effectively, KFC, that kind of thing" (P9).

6.2.3. THEME 1.3: THE INFLUENCE OF THE MESSAGE STRATEGY ON OOH ADVERTISING MEDIA PLANNING

This theme deals with two issues: Firstly, the interdependence between the planning of OOH advertising media and the message strategy; and secondly, some practical advice on the effective message design and executions for OOH advertising media.

6.2.3.1 The interdependence between planning of OOH advertising media and the message strategy

These OOH advertising media specialists were not responsible for planning the design or execution of the messages, since this is usually the responsibility of

creative specialists in an advertising agency. However, the interdependence between OOH advertising media plan and the message strategy was an important issue mentioned in the discussions. The level of co-ordination and interaction between the participants and the advertising agencies responsible for the planning of the message strategy varied greatly, and often depended on their relationship with the different agencies and advertisers involved.

As one participant commented that: "*in general we work integrated and really well on the agencies side and the client. So, sometimes we don't have face-to-face time with the direct client, but we have meetings with the media agency and the creative agencies, to talk and brain storm*" (P4). While in other cases "…*the agency will email us something vague, and then they will have to phone them and ask them to explain much more. And we would have to ask so many questions, so we can do the best for the client*" (P7).

In general, participants seem to have very little input on the message design and executions, since these decisions have already been made by the advertising agencies before the planning of the OOH advertising media campaign commences. The alignment of the message strategy and the media strategy seems to be a reason for concern. The lack of effective and creative message design for OOH advertising media was a concern often raised.

A major reason seems to be a silo approach, where media planning and message strategies are designed by different functions or agencies, with little interaction and cross-functional teamwork. Some commented that this problem to design an effective and creative OOH advertising message is not only experienced in South Africa, but seems so be a global challenge as well.

> "*I think creative is the single biggest challenge we have, globally really, because it is not a uniquely South African problem. ...Unfortunately, the media people have very little input. That is a constant challenge; and I think that is the sad dichotomy – if you look at how the process works – that we work in isolation from one another. Often the process – in an ideal world we would be involved in the process from the word go – you know, briefing the creative and so on, but it just doesn't work that way. Things get too busy, people, there is still the whole advertising industry tends to still be somewhat silo-eyed. You know, people work in silos; and there is not all that much cross-pollination of ideas*" (P10).

Another regarded the reluctance of creative specialist in advertising agencies to design messages specifically for OOH advertising media as a contributing factor to the problem; and remarked that "*creative agencies have all the technical skills and tools to create these creatives for outdoor, but they just do not have the drive. Because there are so many more rewards with TV adds. You win more awards; there is more money in it, and far more prestige. There aren't enough rewards in outdoor; and a lot of categories (alternative OOH advertising media platforms and formats) are left out of the out-of-home awards given*" (P6).

The effective conversion of the message primarily or originally designed for other media in the overall IMC plan to OOH advertising media also seems to be problematic; and this is another reason why OOH advertising messages are often not as effective. The quotations below illustrate this concern of simply using messages that were designed for printed media or television on OOH advertising media – without customising or changing them to maximise the effectiveness thereof.

> "*To design for a billboard is entirely different than to design for a print ad. It has got to be bold, with five words max. Sometime they just don't get it right*" (P5).

> "*Outdoor ads that just use the creative designed for print ads are often too busy and not effective*" (P8).

> "*The creative is often a problem; some people at the agencies think that what they do on TV, they can do on a billboard. That is obviously not the case*" (P4).

Despite the obstacles experienced in the co-ordination or planning of the media and the message strategy, the participants stated that they sometimes play a role in ensuring that the media plan and the message executions are properly aligned.

The first role they play is to provide input or advice into the execution of a specific creative concept, or into the feasibility of implementing an unusual campaign idea, such as customised outdoor advertising signs and super-large formats or OOH advertising media campaigns used with tactical promotions. With regard to this execution of creatives, participants may sometimes be approached to provide input about site specifics, where it would be placed, or any possible dangers inherent in a message execution; for example, when three-dimensional pieces are created that

hang over the edge of an outdoor advertising sign, or safety regulations that need to be implemented when large buildings of several storeys are being wrapped with advertising. The advertising agencies then design the message or execution, based on the information provided by the OOH advertising media specialists. When a media campaign involves ambient or alternative media or special promotional requirements, OOH advertising media specialists may be asked to provide input into the feasibility of executing an unusual campaign, or to provide input into the planning and design of an unusual campaign.

Below is a quotation illustrating the participants' role in providing advice for executing a specific creative, and judging the feasibility of implementing an unusual campaign using alternative media.

> "Ouma biscuits did a campaign where the whole thing (branded scooters with "Ouma" drivers) was branded with Ouma, driving around wherever, handing out pamphlets and Ouma biscuits. We had to help them to make sure that it could be done. So we guided them on how to make their idea work, on this new out-of-home media type. So – not in the idea itself, but to make the idea implementable and effective for out-of-home. Like could it be done? How does the promotion fit in?" (P5).

Another role played by participants involved maximising the impact of a message by matching it with a specific media vehicle, such as the size, format, and type of structure, as well as by ensuring that the message with different executions, such as different languages, or the vernacular, or visually layout were placed in the best possible location. Specialists would then ensure that there is congruency between the message content and the site or format and the location. It is important to bear in mind that South Africa is a multi-cultured society with eleven official languages, and various dialogues of each language.

So, advertisers who target specific ethnic or language groups can thus focus on specific areas and translate the copy of the messages into different languages or vernacular languages, or change the message to customise it for market segments in different geographical areas.

> "Sometimes, they (advertisers) have layouts that are landscaped that work for their products or it's specified in their corporate ID, often written in stone before. We need to know what if the format plays a role or not. We often have that with alcohol beverages, where billboard that is a portrait

just works better. Absolute Vodka, for instance, needed portrait size a few years ago in Cape Town, and at that stage we did not have billboards that were portraits – only the traditional landscape format "(P9).

"We might need to consider specific information on the creatives: Would only landscape formats or portraits do? What is best? How many creative executions will there be? Where must they be? Are they to be in local languages?" (P10)

6.2.3.2 Advice on the effective message design and executions for OOH advertising

As explained earlier, the OOH advertising media specialists are not creative or design experts themselves; but based on their experience in this field, they can offer some practical and valuable insights on how to achieve synergy between the medium and the message design or executions.

Firstly, the message designed for OOH advertising media should be short and concise to portray a strong, single idea. Several of the participants confirmed this familiar "less-is-more principle", especially when the message is aimed at fast-moving traffic, by using short copy and a limited number of visual cues because of the limited time for exposure to the message. One participant advised: "*Keep your campaign simple and bold. In a split second you have to be able to tell who the advertiser is. You have three seconds to make that connection with a billboard*" (P6). Another one agreed "*You've got to be able to read it in three seconds*", and added: "*You have to use contrasting colours and use no more than 3 to 5 elements (copy and visuals) max. The message has to be strong and bold, with five words max*" (P8).

Secondly, the requirement of instant brand identification – by ensuring that the logo and/or product are prominent and clearly visible from a distance, is also important. Some suggested the use of bright vivid colours of the brand, strong simple clear-cut branding and prominent placement of the product and logo. These principles are illustrated by means of an example of *Cat Footwear*. "*It is nice and bright and it is simple. It's effective. They use it very effectively for their shoes. They typically do not feature more than three models of shoes on a poster. The logo is a legend. It says*

what it needs to without trying to be too clever. I think it works. They are not trying to get too clever" (P10).

Thirdly, there is the advice that deals with the design, by using large and appropriate font types for the text, or copy with contrasting colours. It is crucial that messages are easy to read from various viewing distances. "*Otherwise it just blends and becomes a blur* (P3)". The copy should thus be in appropriate font size, type and spacing and colour. This would ensure that it is readable from various viewing distances for a mobile audience.

Fourthly, the size, the number of OOH advertising media vehicles, and the type of format would also influence the impact of a message. For example, to "*brand an entire taxi or brand a taxi rank or busses*" (P6) would be more effective than just to brand the back of a bus or taxi, or just placing one board at a taxi rank. Another example is to tell the story by placing different messages on a few boards in rows, or to use larger boards in very busy or crowded environment, such as in townships.

Fifthly, use vernacular advertising messages or different executions when targeting specific ethnic or language groups. Using a local language or dialect that is native to a specific region or specific languages can get the targeted audience's attention and support and give a long-lasting impression. Radio advertising is known for being a local medium, and for using specific languages; however, this seems also to be possible when using OOH advertising to get the attention of a certain market.

This is especially effective when integrated with the other media used in a campaign. This strategy should, however, be applied with caution and understanding of the culture of the area, in order not to alienate some people.

> *"Radio tells you about the product. Outdoor provides the backend for it. If you go regionally and African language services, radio, more parts are used and that is going to – let's say in the Eastern Cape – there will be Xhosa advertisers on radio. Do your billboard in Xhosa as well. That is going to work quite nicely... vernacular advertising is something which can be very, very effective. It has been used with great success in the past. You have to be careful thought to ensure that the population is typical of a specific area, otherwise you run the risk of alienating some of the residents. In Soweto, Zulu is not going to work. Tswana neither. You don't do it because it is a mix of people who live in that area. You can say that, if you use Zulu pretty much*

anywhere in KZN; you can say that, if you use Xhosa pretty much anywhere in the Eastern Cape" (P10).

The key findings of the themes within this theoretical construct (the alignment of the OOH advertising media campaign with the overall IMC plan) will be summarised in the following section.

6.2.4. KEY FINDINGS RELATED TO CONSTRUCT 1

6.2.4.1 Key findings for theme 1.1: The role and function of OOH advertising media specialists in the planning of OOH advertising media

The OOH advertising media specialist agencies are relatively new in the South African advertising industry. They act as an intermediary between suppliers of OOH advertising media (the large numbers the OOH media companies and owners offering a variety of OOH media formats and vehicles) and users (media agencies and advertisers who employ this medium).

Five specific roles or functions of OOH advertising media specialists could be identified from their perspective: Specifically the neutral and objective selection of OOH advertising media, the selection and integration of the best OOH advertising media options, the offering of a one-stop OOH advertising media service, the specialised knowledge in OOH advertising media planning, and increasing the overall market share of OOH advertising media in South Africa.

6.2.4.2 Key findings for theme 1.2: The role and specific purpose of the OOH advertising media in the overall IMC plan

The participants planned OOH advertising as support media for national advertisers, either to reinforce the theme or message conveyed by the primary media, or to reach certain geographical segments of the market more effectively than can the other media. However, it was also clear that OOH advertising can play a primary role as directional medium for national advertisers close to where their brand is available, and also for smaller local advertisers close to their business – to increase consumer

traffic to their store. In these cases OOH advertising media is not a support media, but rather primary media or even the only media used.

With regard to the purpose of OOH advertising in overall IMC planning, it was revealed that it can be employed to achieve marketing communication objectives on cognitive and affective, as well as on behavioural levels, and also on a combination of these objectives.

6.2.4.3 Key findings for theme 1.3: The influence of the message strategy on OOH advertising media planning

The interdependence between OOH advertising media planning and the message strategy is another issue that influenced the alignment with the overall IMC plan. The level of co-ordination and interaction between the participants and those responsible for the planning of the message strategy varied greatly. The relationship between these two parties was not always seamless; and there seem to be some cases of a lack of communication or understanding.

A number of potential problems contributing to the problem of ineffective creative OOH advertising messages could be identified, specifically the lack of co-ordination and synergy between the planning of the media and the message; the reluctance of creative specialists in advertising agencies to design OOH advertising messages; the ineffectual conversion of messages designed for above-the-line advertising media to OOH advertising media.

Some practical advice on effective message design and execution for OOH advertising media was also suggested; and specifically to focus on the most important idea to be conveyed, and to use short copy; use an appropriate font size, type, and spacing – so that the messages can be easily read from various viewing distances; instant and clear brand identification with the use of bright and contrasting colours; consider the specifications or characteristics of the media vechles; use vernacular advertising messages, or different message executions, when targeting specific ethnic or language groups.

6.3 THEORETICAL CONSTRUCT 2: PLANNING OF OOH ADVERTISING MEDIA

The theoretical construct related to the planning of OOH advertising media comprised four themes; specifically, defining the OOH audience based on the target market; media objectives and major OOH advertising media strategies; evaluation and selection of the OOH advertising media mix; as well as the OOH advertising budget and timing.

The themes and relevant categories are illustrated in Figure 6.3; and they will be discussed in the following sections.

Figure 6 3: Conceptual network of the planning of OOH advertising media
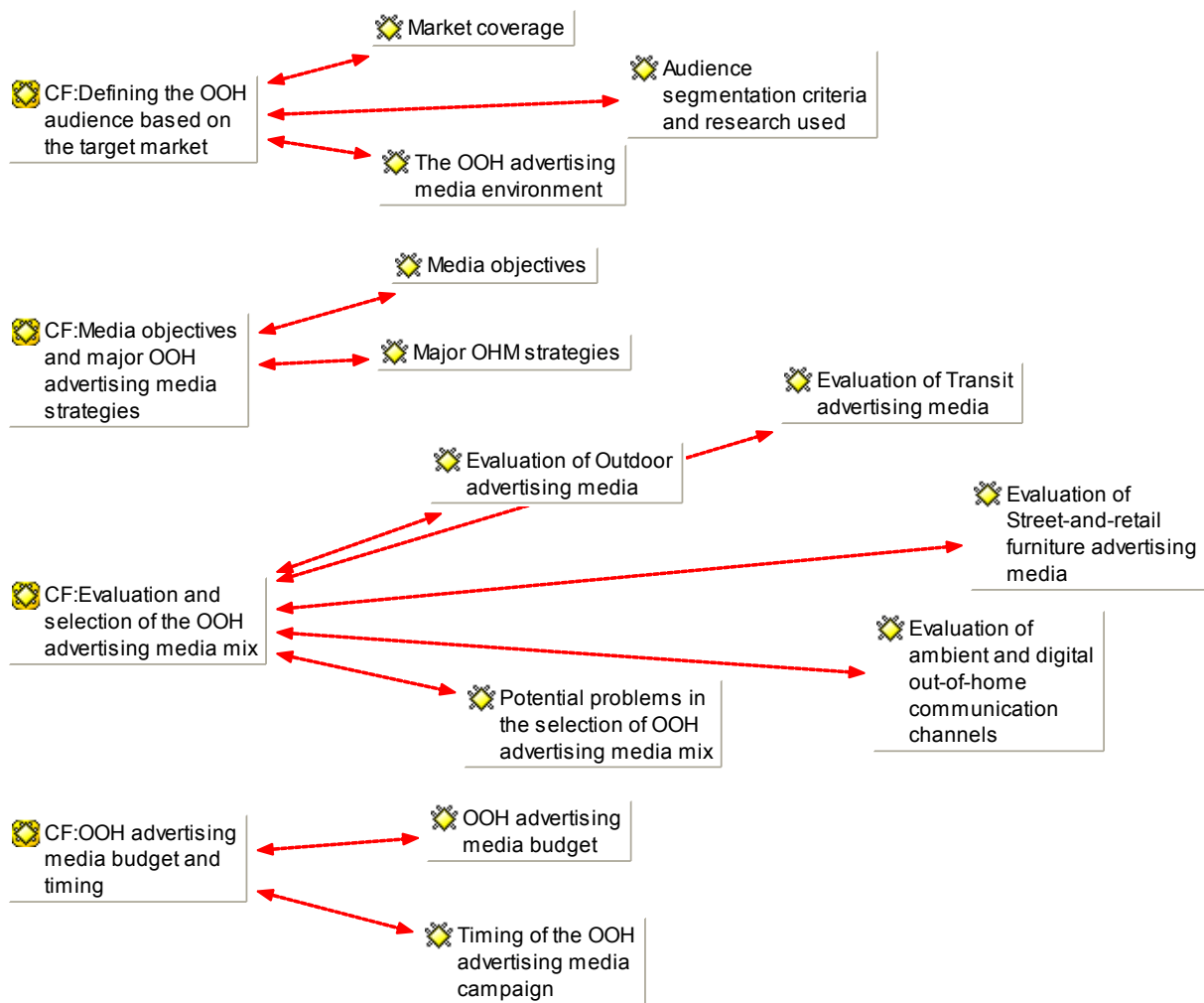
6.3.1. THEME 2.1: DEFINING THE OOH AUDIENCE BASED ON THE TARGET MARKET

Decisions regarding defining the audience for an OOH advertising media plan based on the target market specified by the advertisers or their agency dealt with the following aspects: the extent of market coverage required, the audience segmentation criteria and research used in the process, as well as the OOH advertising media environment where the target audience will be exposed to the messages.

6.3.1.1 <u>The extent of market coverage</u>

The extent of market coverage required for a specific campaign largely influenced participants' selection of OOH audience and the medium used for a campaign. One participant explained that if the advertiser is a fast-moving consumer goods company aimed at a broad mass market, commuters would possibly be the OOH audience and public transport the ideal medium. However, if the brand is a luxury brand sold at upmarket jewellery outlets high-income shoppers at shopping centres would be the ideal audience.

> *"If a client typically wants to reach the mass market, such as a Brandhouse product or something like OMO, or whatever, which is high volume of people and middle to lower LSM, you immediately look at things like modes of public transport. If you look at the mass market, you are going to look at high volumes and you are going to look at pedestrian exposure and public transport. An opposite example, I am working with a brand of watches at the moment that specifically targets high LSM. The cheapest watch is R14 000, so it's a high-end product. Then you start leaning towards certain shopping centres, very exclusive shopping centres" (P9).*

Another example also confirmed this principle: If a specific geographic market or city was targeted, free-standing outdoor advertising boards on main arterial routes in the city would be considered; while if a very specifically defined audience, such as health professionals had to be reached, place-based media in medical centres would be the most effective.

> *"Depending on what the different brief is, it could be that they are looking to reach a high income market working in a area, then I will look at all available billboards on Sandton drive ... Or the brief might be about targeting doctors in Johannesburg. Then we will go and look at all the medical centres and find what is available around that" (P6).*

It was clear that different OOH advertising media and locations selected are largely influenced by the level and the type of market coverage needed. OOH advertising media are used as broad-based media to target vehicular traffic on highways, but are also applied for more targeted reach at specific locations or places. Targeted reach is typically obtained by selecting media located at specific geographical positions and places, such as close to or at schools, office parks, public health clinics, medical clinics, shopping and leisure venues – depending, on the specific profile targeted by a campaign.

6.3.1.2   Audience segmentation criteria and research used

When translating the OOH audience from the target market specified in the brief, the specialists typically commenced by considering the geo-demographical criteria for a broad selection of the OOH media audience.

> *"LSM is the first major criterion. You would look at age, race, gender, the normal demographic criteria" (P6).*

> *"... which areas and whether it is a township-based client or a CBD-based client" (P1).*

> *"... the age, race income and LSM, location (city-wise) that they want to reach" (P8).*

However, they also took into account some typical psychographic and behavioural segmentation criteria, such as the lifestyle, activities and frame-of-mind of the OOH audience in different OOH environments, travel or mobility patterns, media exposure and consumption.

> *"Because that is a key factor of effective outdoor communication, to understand the dynamics of how this target group operates in its daily life... the upper LSM for lack of a better description have become blasé because they are exposed to so much media – something like that promotion where someone sticks a product in your hand; for them is a hassle, whereas for lower LSM consumer it is a affirmation of his or her importance as a consumer" (P10).*

> *"You have to put some pertinent message inside the taxi, because they are there for 20 minutes at least, thinking about what to eat, where to get money, their children, their job" (P4).*

The examples below demonstrate a process of audience-centric planning by the participants. They demonstrate the application of geo-demographical criteria for a

broad selection of the OOH media audience, as well as typical psychographic and behavioural segmentation criteria, in order to effectively match the OOH advertising media platforms with the targeted audience. They also illustrate how the specialists apply personal and professional experience and insight when analysing and defining the target audience for a campaign.

Furthermore, they also reveal the role and value of consumer insight research, and how it is used to match the best OOH advertising media options for the audience targeted.

"Once they (client or agency) have briefed us on the target market, we say okay; this is the target market; now we need to try and understand the consumer. So we will look at our research that we have done ... which gives one it by target market or by area or whatever criteria you select. It can show you like what kind of out-of-home mediums they are most likely to prefer to use, at what times of the day and the activities that they do. All these are used, in order to really understand them ... It is so detailed that we, for example, say we are looking at women between 25 and 49 with children, living in Johannesburg. So, what are they doing? What are they thinking? What media are they consuming? What media reaches them best? So, what time of the day are they doing what? So, I will target them with different media in the morning perhaps when they are dropping their kids off at school, than when they are shopping at the mall weekends or after work... Those types of crucial issues help us to define what media will work best for which target markets. So that comes simultaneously with our experience in the industry, as well as considering research After a few years you kind of get an understanding of targeting women with children, or business people or holiday makers and so one. I've known certain combination of formats that would be really effective for certain target markets. This understanding and process of examining the market kind of comes with time and experience. And so, yes, you will always have to focus on understanding the market you want to reach, and not just using any media all over" (P4).

"It is basically about translating that target market (of the overall campaign) and understanding the consumer in-depth: How they behave; what they think; and the environments in which they are most active. Only then you can select formats or plan your strategy to reach that specific target group or those consumers where they are most likely to be and most likely to be receptive to the media. Sometimes, you know certain parts of the day or in environments – they are seeing the adverts – but, they are not really taking them in or noticing them. So, you will take all those types of consumer details into account. For example, when they are driving, they are not concentrating; they don't notice the advertising on highways, for example. So then, we would avoid highways and we would look at mall advertising or something like that. You can literally go down into detail as to which brands or products people might be thinking of at certain times of the day. The more detailed your analysis of the audience; the better will be your insight" (P5).

6.3.1.3   The OOH advertising media environment

Another aspect influencing the decisions regarding the audience was the impact of the OOH advertising media environment, where the target audience would be exposed to the messages.

Four issues related to the media environment could be identified in this regard. Firstly, the surrounding milieu, and the architectural design of the OOH advertising media structure must complement the type of product and brand image and the message content.

"If you advertise in a very good area on high quality sites it will compliment the brand or message. Sometimes there is no choice, like in rural areas you have to use a 48sheeter on scuffle poles. You might use that for Vicks or something like Zambuck and so on" (P2).

"The client showed me the creative because the creative was to guide me to find suitable sites, because of its orientation and the type of creative they wanted to be, like near a rugby stadium because they had a rugby player and if they had an animal they would have wanted to be near the Zoo. So, make it a bit more relevant, whether it was just because you are a rugby player and it's not near a rugby stadium it is not going to be detrimental to the campaign, but it creates that association that can help people to remember" (P1).

"So your product visual or branding must be displayed in the most suitable area, as well as surrounding environment. You could be dealing with a client doing mass marketing and advertising; for example Vodacom, but they are aspiring to the higher end, because of income and so one. They will go next to the highways; it is not that important that it's a 100% neat around their billboards, so you will put them on the N1" (P9).

Secondly, the frame-of-mind or mood of the audience in the specific environment would also influence the type of message to which they would pay attention, as well as the level of engagement with the message. The examples below illustrate how the mood of the audience influences the selection of media by the participants.

"So if they want to reach mothers in lower LSM areas, they can use public clinic advertising, where you can advertise on the boards outside or branding inside the clinic, such as the walls, and lights. So they also beautify the clinic and get feedback from the mothers and the community. So they will have a nurse coming in, while the mothers are waiting for their babies to be treated, and have her asking them questions, like why aren't they using this product; and educate them about the product. And that way the client gets direct feedback from the target audience" (P8).

"Mall activation space where you are kind of intrigued and you are involved and you can engage with the brand and then it maybe takes you through to the store...or the right messaging in the right street at night ... but kind of like a bit of intrigue that gets created and what we did was we, I'm not sure if you are familiar with the Long Street, it's a huge site, at the very top of Long Street, it is one of the biggest sites in Cape Town that MTN is on at the moment;. It is very unique because it literally forms part of the one side of a whole building and it has got all the windows" (P5).

"The consumers' level of involvement should also be kept in mind. It all depends on the format, with impulse products, you want to be in the parking lot of the mall as they arrive, and you want to be on the platform as they get off a train or plane. It all also depends on the environment where you do it. Do they have the time to look; and are they in the right mood for your product" (P3).

Thirdly, the surrounding clutter or competing stimuli in the environment – such as an overcrowded entrance to a shopping mall, competing outdoor advertising boards in a township environment, or too many passengers at certain locations in an airport – can limit the effectiveness of the OOH advertising message delivered.

"If you have got up a visually unappealing message, it becomes part of the general landscape. People look beyond it. Having an engaging offering – an engaging visual offering – and people will look at your message. Then you will be surprised. These things work so synergistically. I can go and select a very good position, but if the message is bad, the effectiveness of that piece of communication gets lost. If the message is excellent, but I have selected a billboard which is at a bad angle to the road and is obscured by trees and people travelling past at consistently 120 km/h, it is also not going to deliver optimally....Soweto is a cluttered environment, I can't go for the smallest format, because the job will just get lost in the clutter" (P10).

"How they would choose it or select it was that we looked at; and we saw the environments that their competitors won't play in ...They weren't very much in Pretoria either" (P5).

Fourthly, the specific OOH environment where the message is to be delivered can also influence the extent to which consumers are willing or able to engage with the media. In the roadside environment, the audience targeted is mostly mobile, with vehicles travelling fast – resulting in limited time for messages to be exposed on boards next to the road. In the transit environment, commuters spend a few hours each day on their way to work and back; so, the time exposed to messages is potentially longer compared to the roadside environment.

In retail or leisure environments, consumers spend more time and tend to be more relaxed, so the potential time exposed to messages and the potential level of engagement is somewhat higher.

The quotations below illustrate how participants apply these principles by considering how the audience's frame-of-mind in different environments might influence their receptiveness and potential time of exposure to the message. It is clear that not only the type of OOH environment, but also the placement of the advertisement in the environment should be taken into account. For example, the environment in a city is different from those in townships. And the placing of the advertisement at certain locations at an airport is likely to be more effective than other sites.

> "Airports would be very low (in terms of opportunity to engage) because they are not in that frame-of-mind ...where they would be open to interact and engagement, as they would be in malls.. And then we would say okay, now we understand where they will be most receptive to our idea and our concept and choose that and develop the concept and develop what we would actually do tactically in that environment.....You need to have the rural billboards; you need you have your constant, like rank branding because what you do in Sandton might not work in the townships and what you do in the townships or what you can get in the townships won't work in Sandton. You know what I mean; it is like each environment is completely different and what is available in each environment is completely different and how consumers take in the media is so different because people in the township are commuting every day, they are in and out of work, they are in the ranks, they are walking from the ranks to home, so you know their environment is very different" (P4).

> "You have to be very tactical at the airport; the best advertising at the airport might be on the carousels (where the luggage is collected); people are standing therewatching it, not just passing by" (P6).

> "Only the first three people sitting in that taxi are going to see the communication. The rest of them are squashed up inside the vehicle. A roadside billboard is of very limited relevance to them, or it delivers limited noting. If you are close to a taxi rank or within a taxi rank or at a train station or a shopping centre, you are targeting pedestrian traffic. There is a longer amount of time in which to note the message. You can go with a slightly more complicated message, because there is simply just more time to consume it, whereas if you are targeting vehicular traffic, you have got only a few seconds in which to communicate your message. That effectively precludes any complicated creative to be used" (P10).

6.3.2. THEME 2.2: MEDIA OBJECTIVES AND MAJOR OOH ADVERTISING MEDIA STRATEGIES

Media objectives are the goals for the media plan; these are to be accomplished through media strategies. The participants explained that OOH advertising media objectives are derived from the overall objectives; and they require a trade-off between reach, frequency, budget and impact achieved, just like the planning of any other media, based on these typical media objectives.

> "You know obviously with each strategy you choose there is something you are not going to be able to do. So with impact you are not able to have a reach and frequency campaign, while with very hectic reach and frequency campaign you can't afford maximum impact" (P3).

> "It all depends on the client's objectives. A client might need wide reach or coverage. Then we will look at where they want to be and what the size of their budget is. They can't be everywhere with large building wraps, with street poles they can get a wider reach. You will obviously target different areas with different media types" (P7).

> "You want maybe 55 billboards, but don't have the budget for that, so you target more buses and bus shelters. Your medium is going to change if you don't have a big budget. You can't just have seven billboards nationally, it is not effective. For example, you can't do a building wrap with only R50, 000 a month. You should then rather look at street poles. It also depends on what your objective is" (P8).

Therefore, the media strategy would depend on what the most important media objective is to be achieved for the specific OOH campaign within a given budget – whether it is to be designed for maximum impact, wide or selected coverage.

Four major alternative OOH advertising media strategies, depending on the most important media objectives to be achieved could be identified – based on the discussion and different practical examples presented by the participants, namely: the "*High-impact strategy*", the "*Geographical dominance strategy*", the "*Extended-coverage strategy*", and the "*Brand maintenance strategy*".

6.3.2.1   High-impact OOH advertising media strategy

If the most important contribution of OOH advertising media is to deliver impact, a typical "High-Impact strategy" can be used. This strategy is characterised by the use of a limited number of large or high-impact OOH advertising media formats – for instance, super large, iconic outdoor advertising formats, spectaculars, super signs, wall murals, building wraps or hoardings, or new innovative media formats. The market coverage is limited to a specific defined geographical location, such as a town, township, or city centre.

The aim of this type of strategy is to go beyond achieving just brand awareness; it aims to build the brand image and enhance the brand status by strengthening or creating positive brand associations. Thus, this strategy should be supported by an outstanding unique creative concept to create a superior brand image, or to enhance the status of the brand being advertised.

Below are some quotations illustrating the use of a "High-Impact strategy" by different advertisers for brand-building purposes. The characteristics of this type of strategy, such as the use of large or high-impact OOH advertising media formats in a specifically defined geographical area, and the application of unique creative concepts are demonstrated.

"Brand building: Omo, for example – they will use larger billboards and formats in the area, because their competitors like Mac (washing powder) would be on smaller billboards all over. Their aim is to establish the power of the brand, as opposed to just making people aware of the fact that it is still on the market" (P10).

"Skyline branding is another one for getting maximum impact, at a cost, of course. For example, the Vodacom Ponti Tower and the MTN ads on the skyline of Jo'burg CBD. These huge advertisements are visible from various approaches towards the CBD" (P9).

"Johnny Walker did the progression thing, they wanted to "show off": Their creative concept was the idea to move – from good to greatness, hope to reality. They are a pioneering brand, so they wanted to be on formats that were like: "Wow!" So they used the Southern Life Centre, which was the biggest building wrap in Johannesburg CBD, and also some other magnificent sites, similar to this one" (P4).

6.3.2.2 Geographical dominance OOH advertising media strategy

"Geographical dominance strategy" can be used if the main media objective is to achieve relative impact in a selected number of geographical areas or zones. The purpose of this type of strategy is to create strong visual dominance or brand presence in a specific zone or zones in selected geographical areas, where the targeted audience typically converge, such as the entire street in a town, at selected shopping malls, or other specific locations, such as around the beach, at specific taxi ranks, or at the sports stadium.

Visual dominance in these zones can then be achieved by advertising the brand in combination with a variety of smaller OOH media formats – such as campaign outdoor advertising sites, street and retail furniture advertising, transit advertising media and ambient communication channels – located or concentrated in prominent visible positions within these zones.

Below are some quotations illustrating the application of a "Geographical dominance strategy" by advertising on a variety of smaller OOH media formats concentrated in specific zones.

> *"If you want to lead the media space in a given area or a certain environment, you aim at (visual brand) domination; this doesn't necessarily mean you have to use all the biggest and the best options (such as with the High impact strategy). No; it means you create smaller touch points, like Lipton (cool drink) did – they dominated specific areas, they had little golf carts, street poles and all sort of media (a variety of smaller media). J & B did this as well. They had certain zones of advertisements. They had Long Street, so they had a whole lot of (smaller advertising) boards on Long Street. We also did contra visions on the shop windows (advertising on the outside of shops) going up Long Street, they had some of the mirror balls (ambient media) hanging inside shop windows. In Melville, they had all sorts of billboards, smaller like 3m x 6m, 7,5m x 5m backlit and then also normal store facia. Then also some street pole ads, bus shelters; so its smaller elements that actually create a strong visual effect"* (P4).

> *"MTN sometimes use domination (concentration of smaller advertising formats in certain areas) and as you see, their yellow brand is being presented all over in certain areas"* (P3).

6.3.2.3   Extended-coverage OOH advertising media strategy

"Extended coverage strategies" are used when the main objective is broad geographical reach or expansion of the current market to a wider market. This can be achieved by using a large number of OOH advertising media formats located all over the areas where the reach is required. The level of media impact is lower compared with the "High-impact strategy" and "Geographical dominance strategy", because of the smaller sizes of the media formats used and the wider distribution of the media across a larger geographical market area.

The OOH advertising media formats that offer reach to a wide mass market, such as outdoor advertising on main arterial roads and highways, or mobile transit advertising in different areas are used for this extended coverage strategy. The reach and coverage of this strategy can be extended even further by rotating the message to new market areas and locations, for example, by using mobile media, such as trailer advertising or the rotation of street furniture advertising.

Below are some quotations illustrating the principles of the "Extended-coverage strategy". The main objective is to achieve wide or extended reach, a large number of OOH advertising media formats that are widely distributed across the market area targeted are used; and the media vehicles can be rotated to increase their reach and frequency.

> "When you are doing a wide reach strategy, you would have a lot more that just one site (location) or at least several sites rotating across areas" (P3).

> "If you are trying to bring across the message to as wide an audience as possible that would mean it's a reach, reach would be the primary concern. Then you try and strike as far and wide as possible. Different formats could achieve that for you. City lights (street furniture advertising) for example – which work on a rotational basis – this means that your poster moves on a fortnightly basis. For a fortnight you will be advertising on William Nicol. For another fortnight, you will be advertising on Rivonia Road. That way you get a lot of band field buck in terms of how the posters are spread around certain specific geographical area. You are not necessarily talking about impact" (P10).

"They are trying to increase their reach so...so they have 8 (large outdoor advertising boards) in Johannesburg on major highways. In the Sandton area they have 3 x 6's (smaller outdoor advertising boards) rotating every 2 weeks that they move to different locations. So everyone thinks: "Wow, they are everywhere"; but they are not really, because the budget is too small. So this is to increase that reach and increase that frequency" (P5).

6.3.2.4   Brand-maintenance OOH advertising media strategy

"Brand-maintenance strategy" is a continuity longer-term strategy, which is used when the primary objective to maintain brand awareness in a number of existing or established markets. The primary aim is not necessarily to build the brand image or status or to extend the existing market coverage. For this strategy, a large number of OOH advertising media formats distributed across the existing market of the advertiser would then typically be used.

One participant explained how this brand presence can be maintained at the existing level of advertising in the existing markets, not expanding the market, but just maintaining the awareness, by placing only one board in each of the existing target market areas.

"You might only have one site in that specific area, but you are not really reaching more people in your (existing) target market. So you could just have one site in each major township, so that you continue to have (brand) presence in the existing market. But you are not doubling-up on (extending) the reach and frequency and not getting more people (from other markets) exposed to your brand" (P3).

Another noted this type of strategy is typically a long-term strategy used by large national advertisers who advertise at specific prime locations on the highways or main arterial routes for long-term brand awareness campaigns used primarily to provide continues reminders to the target audience.

"…so that long-term outdoor strategy helps them; it is working to build their brand. With these clients of mine, we only review once a year, so our relationship is very much been going forever and we speak only once a year. I meet with them and will get into the car and drive to look at their billboards, and then of those billboards, we will renew about 70-80%, because we chose right the first time around. It may be that 20%, of them need other available options, and we would then move them. So it's more of a long-term strategy for long term branding, in a way looking at all the existing outdoor media in their strategy and keeping the best" (P9).

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6.3.3. THEME 2.3: EVALUATION AND SELECTION OF THE OOH ADVERTISING MEDIA MIX

There are a large number of OOH advertising media options available; and these are rapidly expanding. These options have to be evaluated, in order to select the best OOH advertising media mix when designing OOH advertising media strategies. The participants' evaluation of the major OOH advertising media platforms in South Africa – comprising outdoor advertising, transit advertising media, street and retail furniture advertising media, ambient and digital OOH communication channels, will be discussed in the following sections.

This will be done, based on the quantitative criteria, as well as the qualitative values considered by participants when selecting OOH advertising media options to be used in strategies. The quantitative criteria included the ability of the medium to reach the target audience(s) effectively, the cost involved in using the medium, as well as the reach and frequency delivered by the medium. Qualitative values comprise the potential impact of the medium, the image associated with the medium, as well as the flexibility offered by the medium.

6.3.3.1   Evaluation of the Outdoor advertising media platform

Traditional outdoor advertising forms the foundation of most OOH advertising media campaigns planned by the participants.

> *"Traditional outdoor or billboards is still the biggest spending of all the out-of-home media. It forms the basic foundation of most outdoor campaigns" (P8).*

One specialist noted that this seems to be different when compared with European countries, where other OOH advertising media platforms, such as street and retail furniture and transit advertising media can be used more often to reach pedestrian traffic and commuters – as a result of their extensive use of public transport – with more people walking between train and bus stations.

> *"We (in South Africa) use more road-side stuff here. People don't drive around as much overseas as they do here. There, they use all the transit mediums, like buses and tube"(P3).*

In general, the specialists agreed that outdoor advertising is one of the only remaining mass media available to deliver advertising messages to a broad national audience – by reaching the broad-based population and the increasingly mobile audience in urban areas.

"…being billboards, you're exposing everyone" (P1).

"…outdoor is the last true broadcast medium in the sense that it cuts across race, gender, age, pretty much all" (P10).

"So, you will find that billboards are sort of the stock standard, you will find them absolutely everywhere; and they are cost-effective in terms of the number of people you are reaching by traffic counts" (P4).

However, the entire range of outdoor advertising formats and vehicles is not always available or allowed for in all areas. A number of the participants noted that the availability of outdoor advertising might be inadequate or limited in certain areas, such as rural areas or townships, where the large format outdoor advertising is scarce; "...*in rural areas, there is not much out there; you've just got 48 street posters" (P2).*

In suburban neighbourhoods or areas, outdoor advertising is also restricted or prohibited, due to the tight control by the local town councils and the stricter legislation in certain zones: "...*pretty much everywhere, except in suburban areas, where it isn't allowed" (P6).* The lack of available outdoor advertising options, as a result of this limited supply of outdoor advertising in certain cities and township areas, combined with a relatively high demand by advertisers, often compels the participants to consider alternative OOH advertising media options, such as street-furniture or transit advertising media.

"We often cannot find sites in Durban, everything is booked and there aren't many sites due to strict bylaws" (P7).

"… in the Southern suburbs of Cape Town, there is the scenic area where everybody would like to advertise because of all the money and the decision-makers living there. It's highly restricted by council, thank goodness for that, but there are bus shelters, so that is the only way to advertise there" (P9).

"If they specifically want coverage in an area where I know it's going to be difficult to get decent billboard availability, I would be recommending taxi's, as in the Western Cape, for example" (P1).

"Not that there are that many (large outdoor adverting such as building wrap or super signs) in those (township) environments ... Your options are limited in townships, because they are not exactly a high-rise building environment, so you are limited more to your large format billboards if that is going to be" (P10).

Outdoor advertising is seen as a very a cost-effective medium, due to its ability to reach such a large number of people. One participant noted, "…*that it is probably the most basic form of outdoor advertising that is available; and it is cost-effective; and you can literally reach any target audience that you want to use with traditional billboards" (P4).* However, the production or printing costs involved for especially large outdoor advertising formats, such as buildings or murals, can be very expensive. *"That is where production comes in. Sometimes production (for a building wrap) can be up to R500, 000. But that is a once-off payment. So, it depends on how long they book it, to make it more cost-effective. Although it is more expensive, it is becoming more popular (P8)."*

It was revealed that outdoor advertising media can be used as a mass communication medium to reach a wide market, or they can be used on a more local level to target specific geographical areas or towns by using geo-demographic targeting. Some techniques on how to maximise this geographic flexibility of outdoor advertising could also be identified, and specifically:

Target local segments in the market by using outdoor advertising vehicles located in specific geographic areas, on secondary routes or specific locations, such as close to schools or in specific townships.

"How you become specific with outdoor is by targeting specific areas, i.e. the northern suburbs of Johannesburg only; and then you stay away from highways and you dominate those routes. Then you would be able to reach a far more exclusive LSM-audience. There is less wastage" (P10).

"The target market reached by billboards is difficult to pin-point because it is so wide. Unless of course, if that billboard is in at a specific location, like a township, or a school" (P8).

Analyse the nature of the traffic, the number of motor vehicles, and the type of target audience on the roads passing the location of the outdoor advertising vehicles using appropriate analytical techniques combined with human insight.

> *"Not Sipho Gumedi driving his taxi. Who might not be making the purchase decision; it might be his wife making the purchase decision. So, you are just narrowing it down to the more specific. Then you could say, yes I've got a travel agency and to travel you've got to have money; so I need to be where money is, and to get to reach those that are most likely to travel overseas. So, therefore, I want to be in or close to specific shopping centres with specific travel agencies in that shopping centre to reach those people who go to shopping centres, who have got money and are likely to travel....we can use research to help" (P1).*

> *"…a lot of field work is involved, going out into deep rural areas, selecting billboards, making sure that there is proper understanding of the location of the target market, getting a good understanding of the layout of the country in terms of where the highest density of population concentration would be, and what environments are frequented by this population, with this target population" (P10).*

> *"It would depend on the client's objectives, and where they want to be seen, like for example I would look at the residential notes surrounding, and is it higher income, lower income, middle income? Is it township or near shopping centres? How big are the shopping centres? Is it between industrial and CBD? Is it close to schools?" (P9).*

Be aware of the all the outdoor advertising vehicles available in the targeted area; and know how to employ them in an effective OOH advertising media campaign that would be able to reach the targeted audience.

> *"So you just find tuning it (media plan) with other out-of-home media types that are bound" (P1).*

> *"If you want to reach business people or bankers, then you'll be in the airports, and the CBD by default. If you want to reach mothers, you would try and be outside schools. …being in suburban areas is fantastic and all the major arterial routes. Because that is where they are living" (P6).*

Focus on areas close to the point-of-purchase, in order to target shoppers or potential consumers, while or just before, purchase decisions are likely to be made.

> *"Or they might say we would rather focus on shopping centres that have Pick 'n Pay's and Clicks ... we go and have a look and see can we do something in close proximity to a point-of-purchase billboard wise" (P1).*

"But if you do a campaign for Pringle (luxury upmarket clothes and accessory brand) for example, I need to understand where their outlets are, who their consumers are, and what they do in the area. This information, you have to ask for. So if they are trying to launch a new handbag and you send them billboards near a shopping centre and there aren't any Pringle shops in the near vicinity you are missing the aim" (P6).

Focus on central convergent areas, where pedestrians and traffic that form part of the target audience pass often, in order to increase the frequency of exposure, such as the entrances and exits to towns or townships, and central shopping areas.

"Speak to the emerging market at exits and entrances into townships" (P6).

"The ideal selection of outdoor always depends on your target market. In rural areas, there is not much out there. You've just got 48 street posters above the trading stores where the local people often come to shop" (P5).

Move or rotate the creative message between outdoor advertising vehicles in major metropolitan areas.

"The Alcohol brands do it very well. For instance, SAB will have 10 brands, so SAB will have 20 signs, so they will just rotate them every 3 months" (P3).

Use a larger number of smaller outdoor advertising vehicles located across wider areas, when higher levels of reach and frequency are required.

"It's quite a popular billboard because they are rotated. So, they are here for two weeks and over there for two weeks. So, you're just getting a bigger reach" (P1).

In general, outdoor advertising was regarded as a high-impact platform, due to its extraordinary size, creative flexibility, new innovations and strategic positions available. In this regard, a number of suggestions were made on how to increase the impact of outdoor advertising – also referred to as the "*Wow factor*" (P7) by participants, specifically:

Use super-large outdoor advertising formats, such as tall buildings, murals or building wraps, to offer strong visual impact and to increase the brand stature. The potential impact of especially large outdoor advertising lies essentially in its ability to create or enhance brand image and positioning, because it imparts either a strong message,

or a powerful image of a differential product advantage in the minds of the target audience.

> *"You would use it with impact. Everyone loves the creative potential of building wraps. The brand can show off a bit" (P8).*

> *"Building wraps are normally for huge impact and visual branding for big brands" (P9).*

Give preference to noticeable outdoor advertising vehicles located at prominent locations that are highly visible, relative to the surrounding environment, or add movement to increase the likelihood that passersby would notice them.

> *"A board that is strategically positioned, that it is visible or the first thing a driver sees when coming around the corner or adding movement to get attention" (P8).*

> *"…the element of movement can attract attention" (P6).*

> *"You have to look at where the people live. What their environments look like and what you want to achieve within that specific environment. If it is impact, you go for large-format campaign outdoors, 12 x 9, 9 x 6, maybe a 6 x 4 in some of the smaller areas because this would carry relative impact" (P10).*

Take advantage of the excitement created by new or innovative or outdoor advertising formats introduced to the market, in order to attract the attention of the target market.

> *"...innovation in outdoor creates excitement as well, like you say the city lights were a good innovation. The big signs down the motorway, these were a good innovation, and the building wraps were an innovation, all that kind of stuff" (P2).*

> *"To re-launch the new Mini, life-size Minis were put up to drive up the sides of buildings, as part of a giant banner campaign. The visual impact was amazing and caused TV news coverage and helped to make people aware of new Mini again and position it as an everyday icon just like it was" (P3).*

Participants did not only focus on the positive aspects of outdoor advertising, but noted some of the limitations of this OOH advertising media platform. Several regarded appalling creative designs and extensive clutter in the environment as major obstacles, while a few mentioned the limitations related to the fleeting, but repetitive message, which becomes wallpaper after a while.

> "...the creatives are often just horrible or a cluttered environment caused by competing advertisements or busy surroundings. I feel that limits the potential impact" (P7).

> " … in fact, its clutter that is a problem for outdoors... if you had lots of different brands there, you wouldn't be able to tell what's going on, and that would be clutter" (P4).

> "...the weakness of a billboard is that it can become boring after three months" (P3).

> "The thing is, billboards may be free to view and they may be on display 24-hours a day, but that does not necessarily mean that people will look at them" (P10).

6.3.3.2   Evaluation of the transit advertising media platform

There are various types of transit advertising options that can be employed in an OOH advertising media campaign, to target different commuter profiles with different levels of disposable income, who typically make use of different modes of public transport in South Africa: "*It (transit advertising media) can also reach different target markets*" (P3).

Consumers in low-income and middle-income groups are typically reached by advertising on buses, minibus taxis and metro-trains: "*Transit is usually when you are talking to your mass market, then you brand an entire taxi or brand a taxi rank or buses. It is great because so many people are using this transport... So typically you would use your transit (advertising) for the low and medium LSM's*" (P6).

Transmit media opportunities catering for high LSM groups seem to be expanding – most of all the different types of transit-media advertising. Until recently, a higher income segment of travellers would be targeted by advertising mainly at airports. As one participant noted: "*airport media is also a class of transit media that reach higher income and business people*" (P4).

However, is seems that there has been a shift from the past, where transit media were mainly suitable to reach the mass market by minibus taxis or metro train advertising to targeting higher LSM groups. As one participant noted: "*the improvements in the public transport will lead to new opportunities*"; and predicted that "*you will get more people (advertisers) involved in the transit media*" (P1). A number of recently introduced upmarket transit advertising opportunities for advertisers to reach higher-income commuters using media options were noted by the specialists, such as branded upmarket taxis in major metropolitan areas: "*...branded cabs like the London Taxi Cabs by Graffiti, which is [sic] beautiful vehicles*" (P9), water taxis at Cape town Waterfront; "*other new transit options in South Africa are the Water taxis at the V&A Waterfront ...You sit inside and it has a bar inside. The taxi at the Waterfront can take you from the hotel to wherever, such as shops and restaurants by boat. These taxis were very visible and unique*" (P8) and the "*Gautrain*" (P5).

Private car branding was another interesting transit media option mentioned, where car owners' lifestyles are matched with the target market of the product or service being advertised. For example: "*You give them your details and then the marketer will say he's trying to reach people at gyms; so, therefore they will go into the database and see who are the active healthy type and goes to which gym and say – good, this is what we're looking for and the perfect ad to have*" (P6).

When comparing the cost efficiency of the different formats of transit advertising media, mass minibus taxis are seen to be able to deliver a message to a large number of commuters at a low unit cost.

> "*Almost 20 million economically active South Africans use public transport on a daily basis, with 15 million using taxis. Taxi advertising is a cost-effective way to reach the commuters' market that is active in the economy, so they have spendable income*" (P7).

Advertising on upmarket transit advertising media, such as the Gautrain station, or at airports is perceived to be far more expensive.

> "*If you are looking for the fancy high class cabs you are looking for high expense, and if you are looking for minibus taxis, you are looking at low expense. However, the cost of new transit, such as the Gautrain, is very high*" (P 3).

"However, airport media are very expensive. For example, a gantry exiting OR Tambo, costs almost R400,000 per month" (P5).

A number of the participants were of the opinion that airport media do not offer satisfactory value for their clients' budget any more, due to the extremely high media cost and the loss of exclusivity – due to low-cost airlines expanding air travel to a wider market, which in the past was only possible for the really affluent.

"The cheap airlines operating over the past 10 years have resulted in air travelling having become far more accessible to a lot more people. One cannot claim that same exclusiveness with regard to the audience at the airports anymore, due to lower incomes; people are also using that mode of transport. So, I think the traditional argument that the airports are the highest concentration of wealthy viewers is less valid now than it was 15 years ago" (P10).

The major strengths of transit advertising media identified are the ability to deliver exceptionally high levels of frequency, together with specific reach, because of the commuters' habitual travel, as well as the specific routes of the transport modes in the area.

"it's a good format for frequency and reach; since, because of the mobile nature of that, it is specifically handy in areas where billboard availability is limited" (P10).

"This flexible medium is good to target hard-to-reach target areas. The client can spell out the exact footprint of the reach required" (P7).

Public transit advertising and minibus taxi advertising media are usually employed to reach the mass market travelling back and forth to major metropolitan areas on a daily basis. Some participants explained that this offers advertisers the opportunity to expose a captive audience to their message several times during the course of a campaign.

"Transit is usually when you are talking to your mass market, then you brand an entire taxi or brand, a taxi rank, or buses. It is great, because so many people are using this transport" (P6).

"It is like a moving billboard, you see it everywhere, it is becoming quite popular, and the main factor is that it is covering a lot of ground. Their reach and exposure is quite high and relatively inexpensive" (P 3).

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Some of the public transport vehicles used for advertising, such as buses and trains follow pre-determined and scheduled routes in specific geographic areas, while the routes of other vehicles, such as minibus taxis and upmarket cabs are more flexible, with a large number of different locations within an area.

> *"This message is going to be relayed, and re-impacted to your broad target audience going on this route, every day, every morning to work and back. Or, we can be targeted, for example, if you just want to target taxis that run next to school routes and you target school kids" (P1).*

> *"For regional reach, branding of taxis or your bus advertising....So if you want to carry a message or a product demonstration or a brand activation – or just getting your message out there for a specific product - you can use the mobile media, and you can take it into Gugulethu (township close to Cape Town) the one day and the next day, Khayalitsha (township in Western Cape), and the next day, off to Durban, the next week you can do Umlazi (township on the east coast of KwaZulu-Natal), KwaMashu (township close to Durban), Claremont up to Jo'burg, wherever you need to be" (P5).*

The transit advertising media attributes should also be taken into account, when planning such a campaign, since this influence the actual reach and frequency of the OOH advertising media plan, as well as the potential demographics of the people in the areas being exposed to the advertising.

The environments where consumers are exposed to transit advertising media offer some positive, as well as some negative implications for advertisers using this OOH advertising media platform. Commuters are a captive audience when waiting at train stations, bus stops, taxi ranks, as well as when they are travelling to their destinations. This could result in more time to notice and be discerning about their surroundings.

> *"These commuters spend on average more than an hour waiting for transport, and some do even far more commuting. They don't have much to do then, so effective advertising can serve as entertainment and information transfer for these people" (P4).*

However, travellers are often very busy and bombarded with messages, while they might not be in a susceptible frame of mind for advertising.

> *"But it (the transit media environment) is very cluttered, people are very rushed, they are not actually looking what are going on around them" (P2).*

It is, therefore, important to place media in transit environments, where travellers might spend more time and are more receptive to advertising messages, such as the business lounge at airports or inside transit-media vehicles.

> *"Unless you have a tactical thing going or a very good prominent site in the airport, that could work very well, because you have your target market flying in and out. Or the business lounges, for example, are very good to be at" (P6).*

> *"But, inside (public transport vehicles) I think it's fantastic, and you can have a slightly longer copy. I mean you even get television inside a taxi and you can have a poster inside a taxi – with slightly longer copy, or a bus where people will read it. So, you can get more of a message across by targeting specific people" (P2).*

Other proposals on the mood or needs of the audience exposed to transit advertising media include the use of relevant, educational or interesting communication messages that are appropriate for the specific commuter segment.

> *"To reach a mobile audience, you would need to determine where you can catch the audience while they are mobile, and what sort of mobility is it. Is it trains? Is it cars, or is it taxis? What is it? And then you try catching them where you can, where they work or play" (P2).*

> *"Colourful, and really good creative messages that demand attention should be used for it to be really effective" (P5).*

Some negative remarks were made by specialists who were concerned about the "*distracting clutter*"(P9) and the frame-of-mind of travellers and the image associated with certain transport-media vehicles. One specialist, for example, stated emphatically that: "*I will never ever put food on the outside of a bus. It can get that dirty so quickly* (P2)". Another commented about the negative image and risk associated with certain transport vehicles ... "*the behaviour of the taxi drivers has an effect on the brand*" (P3).

This was confirmed by another who explained that: "*Some brands that won't use transit advertising, such as alcohol and other certain financial brands" (P3)*. Not all brands or product types might be suitable for transit advertising; so, it is therefore important that careful consideration should be given to the fit between the brand/product image and the type of transit advertising used.

6.3.3.3   <u>Evaluation of the street and retail furniture advertising media platform</u>

This smaller OOH advertising media platform included both street furniture advertising of "*various types from bus shelters to dustbins, to naming of street names*" *(P2),* as well as retail-furniture advertising, such as "*info kiosks or even parking ads, such as booms, parking bays or parking tickets*"(P7) at or inside the point-of-purchase. One participant noted that smaller formats and street and retail furniture comprise a fast-growing sector of OOH advertising media "*to the focus in the market, which has shifted to smaller types and city lights, away from big (outdoor advertising) signs*" (P2).

The participants explained that street and retail furniture advertising media can be used to reach pedestrians, commuters, potential shoppers and slow-moving traffic in suburban and other specific areas, where large or outdoor advertising formats are not legitimate or available – offering, thereby, more precise reach to specific markets. The targeted audience profile reached by this medium offers *"fantastic exposure in the exact spot"* (P9).

The selected suburban and shopping environment in which street and retail furniture advertising media are located make the medium ideal for different applications, where more narrowly defined markets need to be reached, especially for:

Targeting traffic in upmarket suburban areas, where other OOH advertising options are not available or are not allowed.

> *"Then there is street furniture which is used when you can't get approved by council sites, but there is traffic" (P2).*

> *"Bus shelter is a small-format billboard in a place where no other billboards are available. If you look at the Cape Town suburbs, there is no kind of advertising available there. I think it is crucially important to provide a communication medium" (P10).*

This mode of advertising can be very useful for reaching very specifically defined target segments in exact demographic areas targeted by advertisers.

> *"If you want to reach mothers that stay in Northcliff (a mostly upper-income residential area in Johannesburg) with and surrounding upper LSM areas, you can target them specifically by using bus shelters or advertising in malls" (P8).*

Targeting selected shoppers and decision-makers close to the point-of-purchase or inside particular stores or shopping malls to obtain and maintain brand awareness is also important.

> *"If you want to reach shoppers, we will go for close-to-point of purchase or use retail media to influence their decisions" (P6).*

> *"This is when you're moving "out of home" (as oppose to outdoor) like carts (trolleys) in a shopping centre, you're talking to shoppers and their partners that are there: people who are making purchase decisions" (P1).*

Inform and remind specific local market(s) or segment(s) about the location of stores or current market offerings of small local businesses, as well as local branches of larger companies, who use it for directional purposes.

> *"They have got hundreds of Virgin Active clubs around the country and a problem that they were having is that no one knew where a lot of their clubs were. ... We said to them it would be ideal for their clubs and the problem they were having is in the areas, for example, like Johannesburg; they booked all the directional signage in Johannesburg. So directional signage, it is like if you have this sign that says: "Bedfordview" as you drive on the road there is a sign that says: "Virgin Active Bedfordview" and the phone number. This was a very effective way to make sure that people know where your clubs are; and then as well as utilising cost-effective media, such as street pole ads" (P5).*

> *"...for your smaller clients who also want to be seen in the right place, it is a very good directional leader" (P9).*

Street and retail furniture advertising media can be more cost-effective than larger OOH advertising media formats – especially for smaller advertisers with directional messages or national advertisers using it to maximise reach.

> *"So that is quite nice and it is generally for brands that don't have as much budget and just to like bear in mind for like bus shelters for example - it is not for the people sitting in the bus shelter, it is for the consumers that drive past as well. So, you are not necessarily just targeting the person waiting for the bus, but also the traffic passing" (P4).*

Street and retail furniture advertising media are also highly flexible OOH advertising media platforms because of their geographic flexibility – to reach very specific areas and the variety of formats available in the market. For example: "…*a client can reach a lot of people with this type in several locations. With street furniture, we do bins, trailers, street-pole ads, bus shelters. These mediums offer our clients frequent exposure to specific targets, which include commuters and pedestrians*" (P7).

Rotational street furniture advertising campaigns can also be used to maximise the awareness created and extend the market coverage obtained for advertisers: *"City lights were a remarkable innovation for this market because they could change posters every fortnight. And they managed to stick to it. That was impressive... it just increased the awareness that could be delivered from a specific campaign"* (P10).

The proximity at or close to point-of-purchase is a major strength of street and retail furniture advertising. Street furniture is effective as directional advertising to guide consumers to the shopping locations where the advertised products and services are sold, or to maintain top-of-the mind brand awareness close to relevant environments. One participant suggested that: "…*this is good for a very strong drive to retail and reach people in the suburbs*" (P3).

Retail advertising can be ideal for reminder advertising to potential buyers who are already at a shopping environment in a shopping frame of mind – to get them to buy or try the product. As already noted, the audience reached by retail advertising "…*are right at that moment deciding what brand to buy*" (P5).

Generally, the image associated with street and retail furniture advertising media, as well as the potential impact of this OOH advertising media platform, could not be seen as good, compared with some larger OOH advertising media formats, such as large billboard or building wraps. For example, a participant warned that: "*One (an advertiser) has to be very careful because it does not necessarily give a high-end image" (*P8).

However, other participants offered advice on how to increase the creative impact and image of this media: for example, by using a large number of streets and retail-furniture advertising media concentrated in a smaller area, or to use witty or entertaining messages that enhance the image of the brand being advertised: "*A campaign like Standard Bank can make its high-end appearance because of volume. Some clients, like Soviet or Converse, have also used it effectively recently in a funny kind of way*" (P9).

Other options are to use it in combination with other larger OOH advertising media formats in one campaign, repeating the same message or using it repetitively, so that the subsequent signs in a row tell an intriguing story. This can result in a uniquely powerful advertising medium: "*it kind of works like bit of a dominance effect (in the environment), because you can take one area like street-pole ads and you literally just see the same brand or the same message and you can communicate quite effectively on a street-pole ad when you have got 3 or 4 signs in a row, and people want to see what the next message is*" (P4).

6.3.3.4   Evaluation of alternative OOH advertising media

Ambient OOH media can often be used when traditional OOH advertising media types are not available in targeted areas. This medium is then used as an additional brand contact point, or when the advertisers have a limited budget available. This can add to consumers' experience with a brand, to cut through clutter, by attracting the attention of a specific market, by "*using all things that you can create in an environment... to create the touch points in an environment for consumers*" (P4).

Ambient OOH media comprises a very wide variety of communication formats. One participant described it as "*a mixed variety that is slowly becoming part of the out-of-home environment*" (P1). Several examples of ambient OOH media were given by the participants. Some of these examples included place-based ambient OOH advertising media in specific venues, such as "*to launch a new headache pill.... brand a water cooler and place it in a doctor's waiting room* "(P6); "*digital advertising and paper towel advertising in wash rooms*" (P1); and "*the J & B (whiskey) mirror ball,*

which was used as a teaser for their 'Start a party campaign'; and Adidas did a giant shoebox container placement in the Waterfront" (P4).

Some other examples, such as *"outdoor events, guerrilla marketing, viral campaigns" (P8),* not usually regarded as part of OOH advertising media, were also mentioned by a few participants.

Participants' opinion of what exactly can be regarded as ambient OOH media differed, probably because this wide variety of options cannot be classified as easily as traditional OOH advertising media, and "*is difficult to put it all in one class*" (P2). One participant described ambient OOH media as very wide – including all OOH advertising media that are not outdoor advertising, for example, "…*all sorts of other things, non-billboards and not usual outdoor media*" (P6). This wide perspective was also confirmed by another participant who included all ambient OOH media platforms that are not classified as outdoor advertising and may even include street furniture and retail advertising, transit advertising, as well as place-based advertising "*anything that is out of home but not a billboard...so it would be anything from bus shelters, movie media, mobiles, to your lift ads, washroom ads, anything like tha*t" (P9).

A number of other participants described ambient OOH media as the implementation of unconventional customised – usually short-term – creative executions by creating new communication opportunities in the environment, or by using unconventional OOH advertising media to create strong brand impressions. For example, according to one participant, ambient OOH media are "*created for the specific objective of that campaign... tactical and ambient is the same thing. ....ambient is creating a new innovative platform...something that almost appears out of nowhere. For me, tactical and ambient are the same thing. When you are looking at something more tactical or ambient it could be anything from one week to a month...That is all the things that you create in an environment. You create the touch points in an environment for consumers."*

This implies that an ambient OOH media campaign is often more about the creative concept than the media; and it can be created especially to promote the brand; and it is not limited to traditional existing OOH advertising media options.

Some principles on how ambient OOH media can be used constructively to deliver high-impact advertising that can break through clutter, could also be identified. Ambient OOH media can allow advertisers to reach consumers in unconventional places, and to attract attention, by using it at unexpected times, but in specific contexts and environments.

Some of the participants noted that it is less expensive than other options; and it can be used to break through clutter.

"To create cutting-edge campaigns, to penetrate saturated markets, and even to reach into consumer personal spheres; ambient doesn't have to be expensive" (P8).

Others explained that it is used in the specific environment to obtain interaction or engagement with a target audience.

"It can also be some other amazing, exciting and "wow" ambient opportunities to break through the clutter" (P3).

"Like when you are in a bar or a night club or something, the tables can be activated by people putting their drinks down. It's difficult for (traditional) outdoor to be interactive, but ambient and digital in malls can be really interactive" (P2).

Ambient OOH media are not usually aimed at a general and passive broad market, but rather at carefully selected groups of more active individuals that could be more easily engaged. The features of the environment where ambient OOH media will be created or placed in, as well as the target audience mood, should be considered carefully to help create an atmosphere where consumers can relate to the advertising message, and participate or engage, by using the experiential component of advertising.

"…because people are in a more relaxed frame of mind when in a mall. They don't mind interacting in that environment, especially if they could win or really experience something. People are looking for a more interactive media" (P4).

The complexity of planning and implementing a truly ambient OOH media campaign was noted by a few participants. Some of them felt that they do not have the capacity to deal with ambient media because this is not in their area of expertise; so it's outsourced or directed to experts in the field. Some conventional or traditional advertising clients often do not want to take the risks involved with these unconventional channels; and they might prefer traditional OOH advertising media, such as outdoor advertising.

> *"It's a specialised area, that's more promotional as well; that's where there's an overflow from promotion to outdoor. It's integrated and it's too specialised for us. I don't have the infrastructure, the time or the inclination to look at it" (P9).*

> *"Often specialists are sourced to developing ambient media platforms that are either too complex to implement by us, or that don't exist" (P6).*

> *"It is difficult to get the clients in this field, because they like what they know; and it is hard to get them to try new ideas... We often work with Ignite, a company specialising in the ambient out-of-home platforms"(P3).*

> *"Most clients don't appreciate the creative out-there ideas. It's a huge challenge to plan and execute such a campaign" (P8).*

- **Digital OOH advertising media**

Digital OOH advertising still seems to be in a developing phase in South Africa. There also seem to be some problems; but it has been improving during the past decade.

> *"Specifically in South Africa I think the quality of digital media has been challenged in recent years, 10 years ago the quality was shocking. Clients weren't really willing to spend money or invest with a lot of effort and money supporting it. With the effort of improved screen quality the appearance has become a lot better. I think as the technology becomes cheaper we will see what digital screens are going up. I think digital has a firm place in the future of the South African outdoor media landscape and it is a case of getting right positions to sell. Digital indoor – the same story you know" (P6).*

One participant remarked that this introduction of new digital OOH media is often driven by the supply of the "*media owners who attempt different angles*" *(P9)* – to bring all the new out-of-home options to the advertisers and media agencies. It

seems that some of the OOH media companies are product-driven – in an attempt to sell their digital media products, rather than following a marketing-oriented approach and focusing on what is needed in the South African context.

The attitudes of the participants towards the current state of digital OOH advertising media available in South Africa, seems to be somewhat divided. Some were very optimistic, especially in terms of the future; while several were rather critical about the effectiveness thereof and the application in a South African context.

"I'm very excited about digital Media"(P2).

"It will come right in the future. If you look overseas, you will find that confidence is also down at the moment; the media owners are not investing in the right stuff yet" (P 3).

"Overseas it is very effective. It is the way of the future. But here we are nowhere near there" (P6).

"Very negative, I am very negative about it. Unfortunately, I'm yet to see any of these electronic displays, plasma screens, whatever they are called – out-of-home outdoors, that are that visible" (P9).

Potential reasons for this mixed feeling is that past technological solutions were disappointing, and not yet functioning optimally, potential vandalism and road safety concerns in roadside environments, high development costs, resulting in expensive media costs to advertisers and resistance by some advertisers to adopt it as part of their IMC solutions.

"Digital outdoor is an option, but not so much in South Africa. You've got digital stuff in airports, but they are very expensive." (P1)

"It is here (in South Africa) and developing, but the market is slow. Clients just do not understand it yet... the digital media that we currently have in South Africa is not working 100%. I do not think people invest in it properly; it is not the best quality; and that does ruin the confidence of the client in the product. Digital billboards are a lot more expensive at the moment. It is very good in terms of indoor products" (P5).

"Media owners are slowly bringing it in. But we have a problem in this country with vandalism, with digital screens, being very expensive. In Cape Town they have put one up. That most likely cost millions, but the people drive past as if it is a shooting range. And there are bullet holes in it, every weekend. So when we have a safer country we will find more digital screens. Or the digital will

take off in the more secure areas. There are different thoughts about the effectiveness of digital media. They are effective, but personally I think they are dangerous. There is too much going on, while you are driving and being too bright (these bright outdoor digital boards can then blind the motorists)" (P6).

Despite the limitations and problems experienced, the participants also mentioned some potential benefits of this medium, such as the more precise targeting abilities, proximity to where consumers make decisions, flexibility because of the opportunity to deliver more dynamic communication content and to involve consumers to participate and experience the brand presented, and greater cost-efficiency.

"The durations of digital campaign can be shorter. You can do daily campaigns for instance a sale at clothing store, it would be fantastic" (P2).

"So you have got to like look and say I can actually have exposure in 100 different locations for the same price I am getting for a billboard and that is only in one location" (P5).

"You can customise and personalise it, so that in the morning, you can advertise at breakfast, while in the midday advertise at lunch" (P 3).

"You reach those areas of congregation, so digital screens within Menlyn – If you look at Menlyn's traffic. It comes close to 30-million people per annum." (P10)

Because of several barriers at this stage, the digital OOH advertising media segment still seems to be very limited in South Africa – with varying quality and availability. It was revealed that most of the digital OOH advertising media can be found indoors; for example, digital in-store media sites are available at airports, certain retailers, and in some shopping centres. This has limited the availability, and also influenced some of the participants' choice of digital media, so that they are then being replaced with more traditional OOH advertising media formats, such as outdoor advertising and street and retail and furniture advertising, when they are not available in the areas where they are needed.

"I might present certain things (to my client) like digital-in-store advertising, but I know that a current problem with these digital in-store advertisements is that they are basically only available in Spar stores. I have to speak to my client and justify the option. I will explain to them that if we go for digital-in-store it will be only in Spar, and ask how vital it is that, or they want other stores. They might say: No, Spar is not my biggest outlet, so I don't want to focus on Spar. I need all shopping centres. So I will agree and say let's do shopping centre advertising, as opposed to advertising in Spar (P1)".

6.3.4. THEME 2.4: OOH ADVERTISING MEDIA BUDGET AND TIMING

The OOH advertising media budget and timing is the last theme related to the planning of OOH advertising media; and it will be discussed in the following sections.

6.3.4.1. <u>OOH advertising media budget</u>

The exact amount allocated for an OOH advertising media campaign appears to be an uncertain area; and this has caused concern for some of the participants. Sometimes, the participants are not briefed exactly on how much has been allocated for the OOH advertising media campaign. The information regarding the client's budget is often provisional – or simply not disclosed: "*The client's budget, however, 9 times out of 10 is not revealed by the agency, because they want to first see what is out there. The reason why it helps to have an indication of the budget is that this could guide one as to which media owners one should approach for stock or not*" (P9).

Sometimes, a Zero-based budget was followed; and the process reversed – where the strategy would determine how much should be allocated to OOH advertising media. "*Sometimes they just use us to develop their strategy. They haven't done anything yet, so they want to see want can be done. So, only when they have finalised which media to use, they will give us a budget*" (P8).

The amount to be spent on OOH advertising media by clients is not always rigid. One reason is because it might be possible to negotiate better prices when buying larger numbers of media for a national campaign from large OOH advertising media companies. "*To look at costing and the budget of the client. Sometimes those needs don't match their set budget. Some clients are flexible and one can bank on them and convince them why you need more money. They know the real price of media and can then negotiate package deals. Media owners, such as Primedia can, for example, offer a discount*" (P2).

Another reason is that more resources can be allocated, once the OOH advertising media have been proven to be successful for the brand. "*Sometime you can do fantastic stuff with the outdoor, in terms of us influencing and how much you get, it is very little, unless you've built up a good relationship. It is all based on your relationship with (your) client. If you do something with them and they see you have done a great job with a small amount of money – then that is how you get exposure*" (P3).

6.3.4.2. <u>Timing and duration of the OOH advertising media campaign</u>

Several aspects were considered by the participants when deciding on the optimum length and time period of an OOH advertising media campaign; specifically, the particular aim and the objectives of the campaign, the planned media schedule, the impact of the creative message over the campaign period, the recency of exposure to be as close to possible to the purchase decision, the available budget, cost-efficiency, the timing of other media, or the promotional elements of the campaign.

"Branding does take longer than a promotion" (P3).

"Do like a burst strategy where, like for Johnny Walker Red, because the whole step-up campaign is a new campaign. It is not like Johnny Walker has never been on outdoor, but all of a sudden they have got this brand new creative. They want people to be aware of Johnny Walker Red Label specifically, drive those sales and then later on, past December, it will probably die down a bit where, Johnny Walker Black might be a little bit more prominent, clients will often do like burst strategies, as well as that which can be anything from 3 months to 6 months and then the longest strategy is like for a year or even longer" (P4).

"Bulk up on your campaign, spend as much money as possible over a shorter period. Then you get critical mass" (P10).

"Generally, after 3 months your campaign becomes like wall paper. And people have seen it every single day, because you can't switch it off. So, we recommend changing their creative every 3 months. But there are some that are very effective and they can stay up longer" (P5).

"Sometimes, the production can cost up to R500 000. So, it depends on how long they book it, to make it more cost effective" (P6).

"Or you need place the ads at shopping centres or stores, speaking to shoppers just immediately before they making their decisions" (P9).

It is clear that tactical short-term campaigns, such as the introduction of new brands, the drive of seasonal sales, or the advertising of promotional offerings are shorter; while the continuous brand building, maintenance and positioning requires longer periods of advertising.

The length or duration of a typical OOH advertising media campaign seems to be about *"3 to 6 months";* (P1) or it could be longer, *"12 months for branding"* (P6). However, some participants noted that the duration of typical OOH advertising media campaigns in South Africa tends to be longer, when compared with other international trends: "*Short in South Africa is 3 months. Short in Europe is a week. Their industries operate very differently from ours. ... a long-term campaign in Europe is a month" (P10).* However, this seems to be changing these days, and the average length of campaigns is also decreasing in the South African context.

Three major drivers of the current trend towards shorter OOH advertising media campaigns in South Africa were revealed. Firstly, large advertisers, especially the financial and telecommunication sector in South Africa and IT companies overseas, illustrate the success of shorter-term high-impact OOH advertising media strategies that have influenced other advertisers to follow their example.

"…so with bringing these new clients in, people started thinking differently about outdoors and realised the potential of using short-term, but of high-impact outdoor as strategy. And now, what happens is short-term high-impact and sometimes longer term for branding" (P9).

"If you look at the Dot.com-boom in the late 90's. There is a wonderful case, it was boom or bust, either you made a name for yourself within the Dot.com industry, or you didn't. You didn't have time to build your brand over two decades, using TV. The awareness-building was just too slow and you couldn't achieve IBM-like stature using TV overnight. It was simply unaffordable and not enough time had lapsed to do that. Out-of home achieved that objective admirably in the late 90's because that was – you may have seen some of the examples of Mac or Apple going up against the sides of buildings – they quickly established, well, they have been in the market for a long time, but some of the other players within that market also went the Out-of home route. Branding double-decker buses in the middle of London; and in a very short space, achieved remarkable awareness. "A" awareness was raised; "B" brands were built" (P10).

Secondly, there are now OOH advertising media companies who are prepared to accept shorter contracts than in the past, as a result of the current challenging market environment.

> *"Also from supply-side years ago, it was a specification for media owners that the minimum booking term was 12 months. So from a rate card which was a typical specification for someone like me to consider, I can sit here and I can tell you straight out that, we don't ask those questions anymore, they take the bookings that they can get, and also from the media owner's point of view, they would say, I need to advertise my expense on building the structure. That doesn't play anymore, you take what you can get, and you buy the campaigns that are out there"* (P9).

A decrease in the available advertising budgets of clients, due to the persistent recession coupled with the increase in media opportunities available on the market, has also resulted in short campaign periods.

> *"One reason is budget, especially after the recession. Clients just don't have any money, and we are still in a recession if you like it or not. Another reason is that there are so many different media opportunities coming up, so the client is scared that if they tie their budget up with a long-term campaign and if a great opportunity comes up that they won't be able to take it"* (P2).

New smaller OOH advertising media formats, such as city lights that allow the creative message of the campaigns to be changed, are ideal for shorter tactical campaigns of only two weeks.

> *"They have got an excellent infrastructure, a very experienced infrastructure in the sense that crews can go and change posters on the tube literally overnight. You pay and you book for 14 days; you get 14 days worth of exposure and on the evening of the 14th day, the guys go in and they will change the posters and the next advertiser gets 14 days. Yes, it is a very effective system abroad. We do not have the ability to do that just yet. I think we will get there. City lights were a remarkable innovation for this market, because they could change posters every fortnight"* (P10).

The key findings of the themes within this theoretical construct (planning of OOH advertising media) will be discussed in the following sections.

6.3.5. KEY FINDINGS RELATED TO CONSTRUCT 2

6.3.5.1. Key findings for theme 2.1: Defining the OOH audience based on the target market

When defining the audience for an OOH advertising media plan based on the target market, the extent of the market coverage required, the audience segmentation criteria, and the research used in the process, as well as the OOH advertising media environment where the target audience will be exposed to the messages – these were all crucial considerations.

Different OOH advertising media and locations selected are influenced by the level and the type of market coverage needed. OOH advertising media are used as broad-based media to target vehicular traffic on highways; but they are also applied for more targeted reach when targeting specific markets. Targeted reach is typically obtained by selecting media located at specific geographical positions, such as close to or at schools, office parks, public health clinics, medical clinics, shopping and leisure venues – depending on the specific profile targeted by a campaign and the availably of the medium.

Geodemographic criteria are suitable for a broad selection of the OOH media audiences, while psychographic and behavioural audience segmentation criteria should be considered, when targeting more specific audience profiles.

The OOH advertising media environment, where the target audience will be exposed to the messages included the following considerations: the surrounding milieu, and the architectural design of the OOH advertising media structure; the frame-of-mind of the audience in the specific environment; surrounding clutter or competing stimuli in the environment; the specific OOH environment where the message will be delivered.

6.3.5.2. <u>Key findings for theme 2.2: Media objectives and major OOH advertising media strategies</u>

When designing OOH advertising media strategies a trade-off is required between reach, frequency, budget and impact achieved, just like the planning of any other media, based on these typical media objectives. Therefore, the media strategy depends on what the most important media objective is to be achieved, for the specific OOH campaign within a given budget, whether it is to be designed for maximum impact, wide or selected coverage.

Four major OOH advertising media strategies, depending on the most important media objectives to be achieved, can be applied, namely: the "*High-impact strategy*", "*Geographical dominance strategy*", "*Extended-coverage strategy*" and "*Brand maintenance strategy*".

6.2.5.3 <u>Key findings for theme 2.3: Evaluation and selection of the OOH advertising media mix</u>

This discussion on the evaluation and selection of the OOH advertising media mix for a campaign revealed that not only qualitative aspects, such as the geographical area or target market reached, the cost involved in using the medium, as well as the reach and frequency delivered by the medium should be taken into consideration, but also the qualitative issues, such as the mood of the commuters and the environment where they consume the media, the potential impact of the medium, the image associated with the medium, as well as the flexibility offered by the medium.

These will all influence the selection of the specific media format and vehicle, the fit between the brand and the medium, as well as the planning of the creative message strategy.

The qualitative criteria and the qualitative media values of the four major OOH advertising media platforms in a South African context have several strategic implications when planning an integrated OOH advertising media campaign.

The OOH advertising media are no longer a homogeneous sector, but now consist of a wide variety of formats and vehicles. So, an OOH advertising media campaign can now be selected from a wide variety of platforms and formats; and one does not have to be restricted to traditional OOH advertising media, such as free-standing outdoor advertising boards. However, in reality, there are still some instances where some of the parties, such as the advertisers and their agencies, are not willing to objectively consider the whole range without prejudice.

The problem is often due to some advertisers or their advertising agencies that often rely merely on traditional outdoor advertising media, not considering other OOH advertising media platforms. Some advertisers and their agency are also not really aware of, or are not willing to consider, the whole range of options.

However, in the discussion with participants there is also evidence that they themselves do not always apply media-neutral planning when considering other platforms, such as ambient communication, digital media and transport media. They often claim that they are neutral in their selection and that they consider the whole range of options. Still, traditional outdoor advertising often seems to be the most obvious or preferred choice. The over-reliance on qualitative values, such as the perceived image of and the impact of the media when selecting the media mix can be risky.

Some of the reasons for not including non-outdoor platforms in campaigns might be valid, such as the genuine problems experienced – due to the low quality and limited availably of digital OOH advertising media in South Africa, or the high price of airport media. However, it is also possible that the exclusion of platforms in OOH media campaigns might be due to biased beliefs, based on personal preference, which is not necessarily objective or accurate.

The complexity of considering all options is another potential reason for not including non-outdoor advertising platforms.

6.2.5.4   Key findings for theme 2.4: OOH advertising media budget and timing

The exact amount allocated for an OOH advertising media campaign is often not disclosed to the specialist. The amount to be spent on OOH advertising media by clients is not always fixed; and this can often be influenced by the discount and the success of the medium.

A number of factors influence the optimum length and time period of an OOH advertising media campaign; specifically, the particular aim and the objectives of the campaign, the planned media schedule, the impact of the creative message over the campaign period, the purchase decision, the available budget, cost-efficiency, the timing of other media, or the promotional elements of the campaign.

The length or duration of typical OOH advertising media campaigns varies, but media campaigns in South Africa tend to be longer compared with other international trends. However, this also seems to be changing. The trend has been towards shorter campaigns; and the average length of campaigns is also decreasing in South Africa.

The focus of the third and last theoretical construct will be specifically on the evaluation and the research into OOH advertising media campaigns.

6.4   THEORETICAL CONSTRUCT 3: EVALUATION AND RESEARCH INTO OOH ADVERTISING MEDIA

The evaluation and research into OOH advertising media could be classified into two dimensions: Outdoor advertising media audience measurement and the role of research and insight in the planning and evaluation of OOH advertising media, as illustrated in Figure 6.4.

Figure 6 4: Conceptual network of OOH advertising media research and campaign evaluation
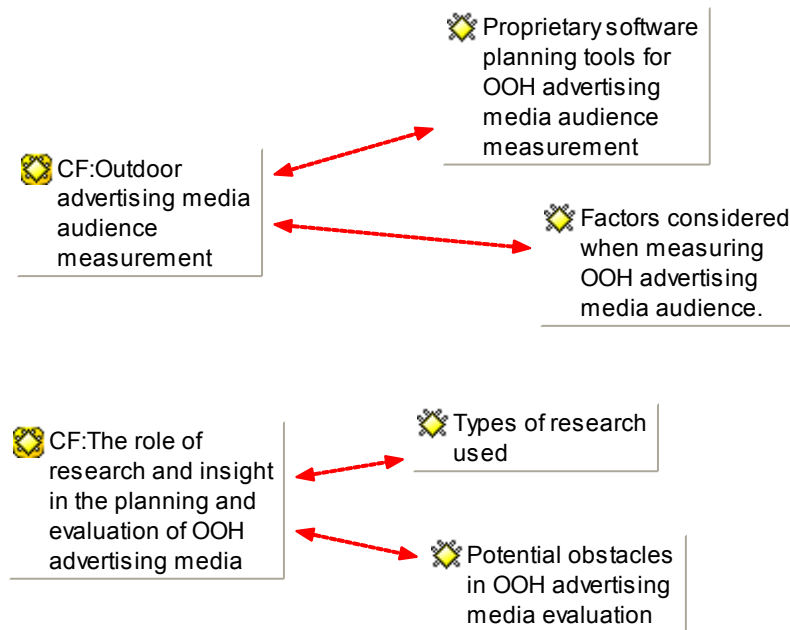
6.4.1. THEME 3.1: OUTDOOR ADVERTISING MEDIA AUDIENCE MEASUREMENT

Outdoor advertising media audience measurement deals with the proprietary software planning tools used and the factors considered in the measurement of the audience of outdoor advertising vehicles.

The term media vehicle refers to a specific type of sign at a specific location or environment. For example, an outdoor advertising media vehicle could thus be a specific 4m x 5m super sign next to the N1 highway between the Botha and the John Vorster off-ramp; or it could be a 7.5m x 5m roadside outdoor advertising board at the main entrance of the University of the OFS in Nelson Mandela Drive.

6.4.1.1 Proprietary software planning tools for OOH advertising media audience measurement

Verifying the size and demographics of the audience of any media can be complex; but it is even more so in the area of OOH advertising media audience measurement, due to the mobility of the audience, and the wide variety of platforms and formats – each with unique features and placed at different locations and in different environments.

"...this process is more complex nowadays because there are so many types of out-of-home media available. It's so broad now. Keep in mind that there are probably more than 150 potential media owners. (P1)

"...the challenge lies when planning a large campaign – to know which site is the best ...so that you can compare one billboard (OOH advertising vehicle) with another" (P6).

At this stage, there is still no objective and standard method used in the measurement of the OOH advertising media audience. This is confirmed by one participant who noted that: *"We (in the industry) do not have the tools in place just yet to say how many GRPs (Gross Rating Points) or ARs (Audience Ratings) or whatever rating currency you wish to use, each (OOH advertising media) campaign delivers, because the tools are not yet in place. I hope that they will be in place ... and then it will be a different story"* (P10).

There have been a number of attempts by several of the role-players in the industry in the past to rectify this problem of the lack of an objective OOH advertising media audience measurement model. And the quest is still continuing. However, at this stage, there seems to be no solution that is acceptable to all the role-players, despite a number of current industry-driven attempts by the professional bodies, including the OOHSA (Outdoor Media association of South Africa) and the SARF (South African Research Foundation), as well as some of the larger media owners.

"That is why I want to do the other research (project) with SARF (South African research foundation) and the guys, so that you've got more of an idea of who the moving outdoor firms are. It's not just residence" (P1).

"That was done, only for media such as Television. You can't do it for outdoor yet, because there is no real reach frequency model. That is where research, such as Quantum Telmar's (Outdoor Advertising Planning Software by Telmar) will come in to do just that" (P2).

All of the participants, with the exception of two, have indicated that their agency has also developed its own proprietary software planning tools to be used for outdoor advertising media audience measurement and planning. A small minority of the participants are negatively disposed towards using this approach based on the quantitative data; and they argue that the information used is based on the actual

location of the media vehicle, as opposed to the mobile audience reached; and they propose that the focus should rather be to develop "*tools about translation – about that target audience to geography* (P9)". However, the majority believe that combining their experience, with the tools used for media audience measurement would be the most effective approach to follow.

These proprietary software planning tools are developed by assessing the quality and potential impact of each individual outdoor advertising media vehicle. This is typically done through the use of location-based technology (GPS), together with field visits to all the site locations – where several factors are then considered to assess the impact of each individual media vehicle.

> "*When we go on our site trips, every single time for every single billboard, we see, we take down the data. So, we would mark it on GPS – first of all, so that we know the exact location of the billboard, we take down what it is like – Is the structure good? Is it bad? Is it falling over? At the end of the day, we don't want to put our clients on poor quality sites. So, we take down all the information, as well as which is the current brand on there. What happens is even though I might not have been to the Eastern Cape; I have got all of that data from the Eastern Cape audits sitting on my computer. So, I can immediately go in there, look at each of the towns that I am looking at. I know how many billboards there are, where exactly they are located; I've got the pictures on hand with all the information (P5)*".

These software planning tools are then developed, based on the data collected when assessing OOH advertising media vehicles during field visits and the information provided by OOH media companies on the outdoor advertising boards they have to offer.

These planning tools are perceived by the specialists as unique; and they are presented to their clients as the strength of the agency, to offer them a competitive advantage in the market. Some commented that "*the tools we use are one of a kind. No other company has taken the time and money to develop the tools that we have*" *(P4)*. Others added that "*we have specific tools … most companies have got their own that they use …Often the principles are similar. … So, I think they have got their own tool, but there are plenty of other planning tools lately*" *(P2).*

Consequently, these tools are not shared for public use; and each agency uses their own tools – in an attempt to differentiate themselves from their competitors in the market.

6.4.1.2 Factors considered when measuring OOH advertising media audience.

Against the background described above, the general process of measuring outdoor advertising media audience is used as basis for the evaluation of the potential audience; and the specific media vehicles used in an outdoor advertising campaign will be discussed. For transparency purposes in reporting this aspect, it is important to note that the discussion with the participants on this topic resulted in varied responses – due to the different approaches, tools and formulas applied, as well as the confidentially of the information.

In some cases, the researcher was shown how the software tools could be applied; some were very cautious, and only explained the process very briefly; others had tools in place, but tended to rely more on their experience; a few do not use any software tools at all. This aspect of measuring the audience of outdoor advertising media campaigns is very important. Thus, in this section, the discussion of the general principles and basic variables used will be reviewed – without implying that it would be valid in all other cases.

Outdoor advertising media audiences can be measured on several levels, from the most basic level of just counting the traffic or motor cars passing by the location, to the actual opportunity to see (OTS) what the average number of people is in these motor vehicles, to the more realistic likelihood to actually see (LTS), which is calculated by considering factors influencing the visibility, such as its size, orientation to the road, surrounding distractions, and whether or not it is illuminated.

Figure 6.5 illustrates the process of evaluation, from the first step of considering traffic counts passing a board, to the final measurement of the likelihood of seeing the face of a specific outdoor advertising media vehicle or board.

Figure 6. 5: Process of OOH advertising audience measurement

Traffic count = average number of vehicular traffic passing the location

OTS (Opportunity to see OTS) =
Traffic count adjusted to take into account
traffic paterns and type of traffic

Visibility Adjusted Contact (VAC)=
OTS adjusted based on site and board
characteristics and surrouding
environment

LTS
(Likelihood to see)

- **Opportunity to see (OTS) a particular outdoor advertising media vehicle**

The opportunity to see (OTS) refers to the chance to see an outdoor advertising vehicle (board) located at a specific location (site); and it is based on the number of adults passing it in an average week. The OTS is an estimated or gross average, indicating the number of people that could possibly see a specific media vehicle, based on the number of pedestrians and the number of motor vehicles passing the location. The basic traffic counts, or the average number of vehicles, which pass a specific location is obtained from either the National Road Agency of South Africa, or from OOH media companies or owners themselves.

Since these traffic counts indicate the number of motor cars passing in the road, they have to be adjusted to take into consideration other factors, such as reduced traffic volumes at weekends, or at night, and the types of traffic.

The type of traffic is important when looking at the actual number exposed to the media vehicle, because there can be drivers, as well as passengers per vehicle, or even the multiple occupants or passengers in minibus taxis or buses. So, the OTS basically counts those people who pass the exact location where the outdoor advertising board is located – and who therefore have an opportunity to actually see the specific vehicle.

> "At this stage of the game, we cannot calculate exactly how many a specific billboard on a specific road have reached and how often. We basically know duplicated traffic, but we cannot yet say what the un-duplicated traffic is. We know that Ben Schoeman takes 300-odd thousand cars per day; and we multiply that by 1, 3; and then you have got your passenger figure, so the campaign delivered X amount of impressions on an audience. What the duplication factor is, we can't say at this stage" (P10).

Opportunity to see (OTS) is one alternative used to assess audience delivery; but it is a very simplistic way of looking at contact by basically counting the number of people passing the position where the board is located. This means that factors that influence the potential to see or notice the face on the board are not taken into consideration. This measurement is clearly not sufficient for effective media planning and a model that allows planners to go beyond simply counting the number of people who pass a site and to estimate those that will actually look at it, is required.

Therefore, the next phase is to adjust the OTS – by considering factors impacting on the visibility of the face on the board.

- **Likelihood to see (LTS) based on visibility adjusted contact (VAC)**

During this phase, the simple OTS measurements are refined or adjusted to take into account the visual impact or potential visibility of the face on the board. This is done by assessing the potential visibility or impact of each board, based on three main aspects: Firstly, the OOH environment; secondly, the characteristic of each individual outdoor site, such as the distance from the side of the road, illumination, the size of the structure, the angle of inclination to passing traffic and the competitive environment and visual stimuli; and lastly, the interaction with the audience, such as

the potential viewing time, based on the traffic flow or congestion, and the overall design or appearance of the structure.

The outcome is a more realistic indication of the possibility of being exposed to an outdoor advertising vehicle – based on all these factors.

Below are some explanations and examples of the participants, and on how they assess the potential impact of outdoor advertising boards.

"You might have two boards on the same stretch of road with the same traffic. But the one could be better, because of the obstructions and the condition of the board. So, you can actually compare the site and suggest the best choice. A site might be classified as solo (board with no other boards or advertising close by), average or cluttered" (P4).

"I have developed my own tool. It includes several aspects, such as the size, whether it is an existing or potential site, which type – such as roadside, walk sides, on rooftops, on bridge. It will specify the streets, town and provinces of interests. Other aspects are if the sites are high above ground or next to the sidewalk, the architecture of the site, and then of course, the vehicle and pedestrian traffic. The assessment of traffic has got to be by specific area ...So in Bloemfontein, heavy traffic would be totally different to Jo'burg... Obviously, illumination, angle of vision, visibility, distance, clutter, competition close by, competitive brands, visibility, comments: for instance, you can put this in the data base and then proximity factors. I apply weights to all of these to find the ratings for the site. Obviously, you have to send someone physically to evaluate each site. You can get media owners involved. ... It is about each of the individual sites. I can look at a site and say: 'That's a good site'. Or, I can look at another site and say, 'Why did that go there? Why did they put that behind that tree, for example?' Site visits are very important, especially because of the money spent on them; but it's extremely time-consuming" (P2).

"Media companies and even some owners have different outdoor tools; but they are based on similar principles (P3)".

Factors that are considered when assessing the potential visibility or impact of outdoor advertising vehicles include the following:

- *Relative size and format*: large formats are more visible than smaller formats.
- *Extant illumination*: if there is no illumination, the advertisement on the board can only be seen during the hours of daylight.

- *Viewing angle or orientation of the board to the road*: boards facing the road are easier to see than those where the passersby would have to deflect their eyes from straight ahead, in order to see the panel.

- *Competitive environment and visual stimuli*: distraction by other features in the visual field, such as trees, buildings and other advertising reduces the impact.

- *Potential viewing time, based on the traffic flow or congestion*: boards located on roads with slow-moving traffic offer longer exposure than fast-moving traffic.

- *General condition and design of the structure:* high-quality architectural designed structures are more visually appealing and can increase the overall impact or image conveyed.

All these calculations of the visibility index of outdoor advertising vehicles to determine the LTS of each specific board are usually accomplished by using software-planning tools; and they can be used by specialists when planning the reach and frequency for outdoor advertising-media campaigns.

The quotation below explains how the software tools can be used to evaluate the visual impact of a specific outdoor advertising vehicle at a specific location. This is also referred to as the site by the participants.

> *"All of these will give the site an overall (visual impact) rating ... It (the software planning tools) takes all the information into consideration, and comes up with a final score. We always have a run-up shot, and also a close-up, in terms of the visual. You see the Long Street site; if you look at it, it gets 77%. And the reason for that is first of all large size. If you look at it, its visibility is good; it is excellent. Run-up (distance of visibility) is 80m, which is much better than the 40m. That will affect the score. Its condition isn't average, like the previous site, but it is good. That will affect the score. The angle of inclination to passing traffic isn't left or right, it is head-on to traffic. Again, it is going to affect the score, because it has better visibility. Traffic speed is slow. That is an example on how we evaluate sites (P4)".*

These proprietary software planning tools are generally only applicable to outdoor advertising vehicles; and it seems that they are not applicable to other OOH advertising media platforms, such as mobile transit advertising media or retail and street furniture advertising.

6.4.2. THEME 3.2: THE ROLE OF RESEARCH AND INSIGHT IN THE PLANNING AND EVALUATION OF OOH ADVERTISING MEDIA

Research and insight are vital while developing OOH advertising media campaigns, as well as the evaluation thereof after implementation. Some types of research and data are used while developing campaigns, such as consumer-insight research and geodemographic segmentation tool to help with the selection of the best geographic locations to reach the target market, as illustrated by the quotations below.

> "So, we will look at our (OOH audience profile) research that we have done like the OCS research which gives you a breakdown by target market, or by area, or whatever, and it can show you what kind of out-of-home mediums they prefer to use at what time of the day, and the activities that they do; and then we can use that and best try and understand them….LSM, age, demographics. All of that. It is so detailed, that we can say women between 25 and 49 with children, living in Johannesburg; we can literally say what they are doing, what they are thinking, what media they are consuming, what media reaches them best, what time of day they are doing what; it is so detailed that we can get a very good idea that if I'm targeting a woman with children, such as a very specific target market, it goes down to exactly what formats are going to reach them best. What they are doing at certain times of the day, what they are thinking. So, I will target them with different media in the morning perhaps when they are dropping their kids off at school; and when they are shopping at the mall in the evening. So it goes down to such detailed information and that helps us to define what media will work best for what target market"(P4).

> Some planners use the Census-information (a geo-demographic segmentation tool) which is available from the Knowledge Factory; they work out billboards in proximity to KFCs, or shopping centres or motor dealerships; so you can fine-tune your billboard strategy, depending on the client around those parameters" (P1).

However, the use of census data as a basis, when planning OOH advertising media, is not ideal, because it does not take into account the mobility of the target audience: "*It just measures the demographics of the residence of an area, which is not representative of all the people reached by outdoor* (P1)"; and it can become outdated rather quickly. "*We can leave it to the client to support our choices, but it is so outdated that is makes no sense* (P6)".

Research can also be used to determine whether the media strategies or campaigns were successfully implemented to reach the stated objectives. This includes research

studies by professional market research companies commissioned by advertisers to measure the effectiveness of their specific campaigns.

> *"Some of the big spenders on outdoor do research on how the medium works for them. Unilever does quite a bit of research on outdoor, also DSTV, and so on (P6)".*

An alternative is to combine direct-response marketing mechanisms, such as toll-free numbers, web addresses, competitions or promotions with OOH media to measure behavioural response:

> *"They (Outsurance) could base on the calls they got, crack where and which billboards were working better than other billboards; and they have accordingly adjusted their holding" (P10).*

Some potential obstacles in OOH advertising media evaluation could be identified, and specifically:

The non-existence of a standard audience measurement system for OOH advertising media audience that is accepted and used by all the players across this industry in South Africa. This means that the audience exposed to different OOH advertising media vehicles considered for a campaign cannot be quantified and compared with one another, or with other media.

> *"Not having a standard system for planning has always been a problem with outdoor advertising, because agencies want standard rates, reach and frequencies to compare"* (P8).

Concern also exists about the neutrality and reliability research published by some of the OOH media companies. These companies have been accused of using the results – primarily as a tool to promote the specific media they offer; and therefore, they were not to be trusted.

> *"The figures are quite simply not believable. You know, if you had to lend out your ears to all kinds of research that is getting done, it is not going to happen. You know, I know what works. Basically, the thing is that I find media owner research interesting. I don't always take it as gospel truth, because a media owner has a specific agenda to promote and wants to sell stock, which is understandable; and he is going to present you with the facts that make the most sense to promote his specific offer" (P10).*

Another obstacle is the difficulty of measuring and isolating OOH advertising media effectiveness as part of an overall campaign, because of the complexity in

determining exactly what are caused by OOH advertising media, and what are the results of the other elements used.

> *"It is difficult to isolate the effect of that outdoor advertising apart from of anyone of the media used in a campaign; for example, television, print media or radio" (P1).*

Complexity and the high cost involved in measuring the effectiveness of OOH advertising campaigns aimed at creating brand awareness at a broad market can be the cause of further problems. The high cost of measuring the effectiveness of OOH advertising media campaign is prohibitive – implying that only large advertisers with large budgets demand that post-campaign research be done. In order to determine the effect of an awareness campaign, both pre-and post-testing of a large representative sample of the target audience are necessary.

This usually requires independent research companies to conduct two separate surveys, with a large sample of participants, which is a costly and time-consuming activity, when dealing with a mostly mobile and widely distributed audience. As expected, this research is usually only commissioned by large companies with sufficient financial resources available.

> *"We mostly do post-campaign analysis; but it is hard to prove that people are now more aware of the product than before. The analysis is mainly based on added value, extra exposure, if there were free gifts given. But in terms of proving that before your campaign, 60% of South Africans knew about your brands, and now 70% know about it, you can't. Unless you do a massive survey, but that would just cost a lot of money" (P3).*

The OOH advertising media, used in the longer term are far more difficult to measure than tactical campaigns aimed at obtaining behaviour in the short term only. While the short-term effect on sales can be measured to an extent, the longer-lasting effect of a campaign cannot be determined that easily. It is possible to monitor short-term responses to advertising or spikes in sales; but gains, such as the increased awareness and branding spin-offs, are not currently directly measurable.

> *"The effectiveness of OOH advertising media campaigns depends on what you advertise and it depends on what you wanted to achieve. Sometimes, there is a collaborative spike in consumption of the product that you advertise. Sometimes, it can be actually measured" (P10).*

> *"...if there's no direct sale, there is no direct measurability" (P9).*

The key findings of the themes within this last theoretical construct (evaluation and research of OOH advertising media) will be discussed in the following sections

6.4.3. KEY FINDINGS RELATED TO CONSTRUCT 3

6.4.3.1 <u>Key findings for theme 3.1: Evaluation and research of OOH advertising media</u>

Proprietary software planning tools for OOH advertising media audience measurement are used by most of the participants in the selection of media vehicles for a campaign. These tools are not shared for public use, but are rather used in an attempt to differentiate them from their competitors in the market. However, there is still no standard audience measurement system for OOH advertising used and accepted by the media and advertising industry in South Africa.

The current fragmented approach – where each role player has his/her own solution for the measurement of OOH media audience delivery – is a major obstacle for the OOH audience industry. The problem with using individual measurements models, and not being willing to work towards a shared solution, but rather to use the tools as a competitive advantage, is that that the audience ratings are not standardised and cannot be directly compared. The problem is thus not the use or development of software tools, but the lack of a standardised basis to measure the audience of OOH media.

Outdoor advertising media audience can be measured on several levels, from the most basic level of just counting the traffic or motor cars passing by the location, to the actual opportunity to see (OTS) and the more realistic likelihood to see (LTS) an outdoor-advertising vehicle. The likelihood to see (LTS) an outdoor-advertising vehicle is done by assessing the potential visibility or impact of each board, based on the OOH environment, the characteristic of each individual outdoor site, and the interaction with the audience.

6.4.3.2 Key findings for theme 3.2: The role of research and insight in the planning and evaluation of OOH advertising media

Developmental research (consumer-insight research, OOH audience media research and geo-demographical data), as well as post-testing are used in the planning and evaluation of OOH advertising media campaigns.

A number of potential obstacles to accountable and measurable OOH advertising were also revealed, specifically:

- The non-existence of any standardised OOH advertising audience measurement system.
- Concern about the neutrality and reliability of the OOH audience research published by some of the OOH media companies.
- Complexity and the high cost involved in measuring the effectiveness of OOH advertising campaigns.
- Complexity in measuring OOH advertising media used in the longer term.

6.5   CONCLUSION

In this chapter, a discussion of the results of the in-depth interviews has been presented. The three theoretical constructs that encapsulate the findings were discussed in detail – using conceptual networks, namely: the alignment of the OOH advertising media campaign with the overall IMC plan; the planning of OOH advertising media; and the evaluation and research of OOH advertising media.

The occurrence of all the themes per participant within the theoretical constructs, are listed in Appendix C.

In the next chapter, these themes will be compared and linked to the larger theoretical constructs found in the literature and a framework for the planning and integration of OOH advertising media in South Africa will be proposed.