**Gordon Institute
of Business Science**
University of Pretoria

**Change management as an enabler for digital transformation in an out-of-home media
business**

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Master of Philosophy in Corporate Strategy

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ABSTRACT

The launch of the internet has had fundamental changes on the media and advertising industry. Traditional media organisations have had to recreate and redesign themselves into the digital ecosystem to ensure relevance and value creation in the media and advertising digital world. The oldest form of traditional media, Out-of-Home, has had to reestablish itself through digital transformation to ensure its survival, by positioning itself as a competitive contender in the digital ecosystem.

This study leveraged the theories of strategic leadership; digital transformation and change management to understand how Out-of-Home media organisations in South Africa are responding to the threatening changes that are happening in the environment with regards to the digital ecosystem. Through the extant literature review it was established that there has been limited research on the Out-of-Home industry, most specifically with regards to digital transformation within an organisation's organisational and structural processes for the enablement of digital transformation. Thus, this study has been conducted to understand and highlight what change management capabilities have been enabled and utilised in an Out-of-Home organisation for the digital transformation it has needed to ensure survival in the future.

The study adopted a qualitative research design as it was exploratory. Interviews were conducted with participants across mature traditional Out-of-Home organisations and also newly established entrepreneurial Out-of-Home organisations in South Africa who have a digital strategy in place.

The results of the study revealed that the Out-of-Home organisations that were researched do not have a clearly defined digital transformation strategy that guides their initiatives. However, the organisations have utilised key change management capabilities in their organisations that drive and support digital transformation in the organisation.

Keywords: Change management; strategic leadership; digital transformation; advertising; media; out-of-home; programmatic; digitisation and digitalisation.

DECLARATION

I declare that this research project is my own work. It is submitted in partial fulfilment of the requirements for the degree of Master of Philosophy in Corporate Strategy at the Gordon Institute of Business Science, University of Pretoria. It has not been submitted before for any degree or examination in any other University. I further declare that I have obtained the necessary authorisation and consent to carry out this research.

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Signed: Jorja Wilkins   Date

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LIST OF KEY ACRONYMS AND ABBREVIATIONS

Acronym/Abbreviation	Meaning
AA	Advertising Agency
BBBEE	Broad-based Black Economic Empowerment
COVID/COVID-19	Corona Virus disease of 2019
CPM	Cost per thousand/Cost per mille
CSF	Critical Success Factors
DOOH	Digital Out-of-Home
DT	Digital Transformation
DTS	Digital Transformation Strategy
E	Entrepreneurial
HR	Human Resources
IoT	Internet of Things
JME	Journal of Marketing Education
LM	Lower Management
OAAA	Outdoor Advertising Association of America
OHMSA	Out-of-Home Media South Africa
OMC	Out-of-Home Measurement Council
OOH	Out-of-Home
pDOOH	Programmatic Digital Out-of-Home
PWC	PricewaterhouseCoopers
SMME	Small, Medium and Micro Enterprises
T	Traditional
TM	Top Management
USA	United States of America
WOO	World Out-of-home Organisation

CHAPTER 1: INTRODUCTION TO THE RESEARCH PROBLEM

1.1. Background to the research problem

"The focus of media plans will shift from channels to screens", the screens include "Television; desktop/laptops and smartphones and tablets" (Kumar & Gupta, 2016, p. 314). The largest screen of all, Out-of-Home (OOH), has come along way in the past few years through digitisation and digital distruption, which has left the oldest form of linear communication – OOH to take its seat in the digital environment and ensure it does not get left behind.

According to the World Economic Forum, in order for the organisation to be successful in the digital economy – it needs to move "beyond viewing technology merely as a cost"; and "successful digital transformation demands a culture sponsored by the leadership that promotes innovation, encourages risk taking and empowers employees at all levels of the company" (World Economic Forum, 2016, p. 8). The World Economic Forum states that, "incumbents" - which for this research project are referred to here as analog, linear or traditional organisations in the media industry, - "have significant resources such as hard assets, brands, global distribution, customer relationships, data and decades of institutional know-how to harness their digital transformation" (World Economic Forum, 2016, p. 7).

The digital entrepreneurs and the democratisation of technology have created a highly competitive environment for analog incumbents to survive, yet through succesful implementation of digitisation – traditional organisations can hold their weight against the "unicorn" start-ups (World Economic Forum, 2016, p. 7). A company's business model can be improved significantly through the use of digital transformation to "enable customer experiences, operational processes". This is significant for the OOH industry in its pursuit to gain some valuable market share through digitisation of its products and processes (Solberg, Traavik, & Wong, 2020, p. 105).

Not only did the format of advertising change but also brought change to the advertising industry as a whole - "When the Internet entered our lives, for example, it brought radical changes in the advertising practice and advertising agency business and gave birth to the new subfield of Internet or online advertising, which morphed into interactive advertising, and then morphed again, now to digital advertising" (Huh & Malthouse, 2020, p. 367). This advertising industry now accounts for 59% of global media spend, and linear media has to fight for what is left over (MAGNA, 2021).

The digital transformation of the media landscape has left traditional or linear media fighting against the powerful digital marketing landscape with some key progressions across print; television and radio as they have been digitally disrupted by technological advancements from the internet, most importantly programmatic buying and selling. Programmatic buying of digital

media, which "uses data and technology and real-time auctions to automate transactions between buyers and sellers" (Franks, Malthouse, & Maslowska, 2018, p. 769) has increased over the past decade and accounts for over "80% of digital display ads bought" (eMarketer Editors, 2018).

The launch of digital OOH (DOOH) into the OOH industry, particularly in emerging markets such as South Africa has made not only the products agile but also the processes of selling the assets faster, "The speed at which new technologies are being developed and adapted in OOH are also giving emerging markets the ability to "leapfrog" in the development of their own offerings. Whereas in the more established markets there has been a progression from static boards to three faced "ultravision" style panels, to scrolling technologies and backlit vinyl to fully digital screens, many countries have been able to skip the evolutionary steps and learn from the developed markets, jumping straight to digital from static" (Flys, 2016).

The growth of DOOH has positioned OOH as an industry steadfast in relation to online and social media digital displays. The reason for OOH positioning and competing against other media formats is: increased advancements in technology over the years; the growth in revenue from increased DOOH platforms over the years and its data collection ability of its audiences. One of the leading programamtic OOH software firms, Broadsign, confirms that "The past few years, the OOH industry has been shaping its future, building an arsenal of digital screens, arming itself with data and strengthening itself with programmatic capabilities", the product has been poised for digital innovation "[It has been] preparing for the future, it just didn't anticipate this future. But OOH isn't just future ready, it's now ready." (Baker, 2021).

Pre-Covid DOOH had a global forecasted share of 24% of total OOH advertising revenue in 2020 and was predicted to grow by 10.9% from 2019, where traditional or static OOH was to remain constant for 2020 (Parker, 2017). In South Africa OOH growth is stable at 2% pre-covid levels for 2020 with the growth coming from digital formats which will account for 45% of total OOH revenue share in 2023, where in 2018 it only accounted for 33% of revenue share (PWC, 2019). PWC reports pre-covid market share for OOH at 12% of the total media revenue in South Africa with Digital/Internet having a market share of 9% and TV with 51% (PWC, 2019). The reality is that Digital/Internet is poised for a growth of 17.5% in 2020 and OOH needs to compete with this (PWC, 2019).

The initial entry of programmatic DOOH (pDOOH) on a global scale had a slow adoption rate, with traditional OOH media personnel having to submerge themselves into understanding the digital media platform world and how to sell DOOH in this disruptive environment. DOOH as a product is positioned to capture the share of online through this digital disruption as OOH now speaks the language that digital media buyers know and understand – agility, impression

buying (CPM rated) and the ability to turn campaigns on and off (Billboard Insider, 2021). The Covid-19 pandemic escalated pDOOH on a global level due to the need of agility in the face of uncertainty and we now see the evolution of DOOH on South African soil with the first pDOOH campaign launched in October 2020 (Adform, 2020).

pDOOH has positioned OOH perfectly to the digital media buyers through being able to buy inventory on platform-based software at the touch of a button. The OOH media companies had now entered into a new exchange environment, the digital ecosystem - with a hybrid business model that met the needs of digitised advertisers looking for speed and agility, and most importantly, audiences. Product and process changes of OOH organisations infrustructure through digital transformation enables the organisations to position themselves alongside digital marketing.

There has been substantial evidence from numerous sources that OOH is poised for growth in the future due to digitisation, digitalisation and digital transformation of the product, however there is a gap in understanding how the OOH organisations have adapted their organisational and structural processes in being able to transform and remain relevant within the market.

1.2. Research problem

The digital transformation success of an OOH company lies not only with capital injection into products for digitisation, but change management throughout the organisation whereby digital transformation occurs at a "technology-enabled perspective" (Burton-Jones, Casey, Draheim, & Eden, 2019). The OOH organisation needs to reassess the organisational structure, processes and culture that are stuck in the old ways of doing things and forcefully ensure that "not being able to adapt" to the needs of digital disruption is mitigated (Karimi & Walter, 2015). The organisation has to transform its traditional processes and mindsets to accommodate an additional or redesigned business model and ensure the employees are equipped to succeed and remain relevant in the environment while maintaining success in the core business.

The onset of pDOOH for OOH has aligned the DOOH media format with online and digital marketing. First to the market with pDOOH globally was the United States OOH media owner Lamar Advertising, who was established in 1902 and has been innovating since inception (Vistar Media, 2020). Being a leader in the OOH industry, Lamar "invested in educating local markets on the value of programmatic, helping their regional teams understand how programmatic can augment existing sales" (Vistar Media, 2020). Programmatic selling has been criticised that it will replace the existing traditional salesforce who contract to large media houses, Lamar disagrees and states that the salesforce becomes a "consultative seller" by pitching DOOH to the digital agencies that "transacts through an Exchange" (Dallimore, 2021). Thus, with the contracting process now being automated through a software platform, allows

the salesforce to effectively sell the benefits of DOOH to the digital buyers. The enablers of digital transformation of this disruption have not been outlined specifically by Lamar and further insight would be beneficial to the industry.

pDOOH was launched 7 years later by OOH organisations in South Africa, thus allowing them to establish the positoning of the product into the market from global learnings. However, there is no evidence to show how to enable this digital disruption effectively through digital transformation processes. Lack of skill and knowledge; conflict of views; management of pDOOH deals and revenue sharing between account managers need to be managed effectively to ensure the success of the pDOOH product and still ensuring maintenance of the the core traditional business. OOH companies in South Africa have for decades managed the selling of their assetts through timeous processes of contracts and schedules. With the onset of pDOOH automation processes, the ways of the past are slowly becoming obsolete and the organisation needs to be enabled for success.

According to Altman et al. "there is a need for further research" on what dynamic capabilities and strategic leadership capabilities are needed for a business to be successful in a hybrid business model or digital transformation (Altman & Tushman, 2017, p. 199). According to Altman and Tushman their research required further understanding of what challenges are there to strategic leadership with having a "hybrid product, services, or reseller organization" (Altman & Tushman, 2017, p. 199). In addition to this "there is no clear understanding of which organisational choices are more effective in allowing traditional companies to integtrate new digtial competencies" (Appio, Frattini, Neirotti, & Petruzzelli, 2021, p. 5).

The study of "digital transformation and innovation management is multi-faceted and multi-dimensional" and continues to be a "fragmented debate" (Appio, Frattini, Neirotti, & Petruzzelli, 2021, p. 10). It is suggested that when researching digital transformation, it is best to look at it through "three levels of analysis: at a macro-level; meso-level and micro-level", in order to fully understand the extent to the role digital transformation plays on an environment or ecosystem and the industies or players involved in the process (Appio, Frattini, Neirotti, & Petruzzelli, 2021, p. 11). Appio et al explains the 3 levels as follows: "At the macro-level digital transformation influences the ways industries are organized and companies interconnected and offers opportunities and threats that depend on contextual conditions, which are in turn related to the social, economic, political, and competitive environment, as well as to firms' organizational and governance structures and corporate culture"; "At the meso-level, the focus is on how organizations structure their capabilities, processes, and routines in response to digital transformation" and "At the micro-level of analysis, the need of companies to reframe their value creation mechanisms involves changes in their micro-foundations that can

condition the transformational mechanisms toward new business and operating models" (Appio, Frattini, Neirotti, & Petruzzelli, 2021, p. 11).

Digitisation has been researched extensively on newspaper publishers and free-to-air broadcasters over the years and the affect it has on legacy business models (Donders, Enli, Raats, & Syvertsen, 2018). "Digital disruption has recently been one of the main focal points of media management scholars" with "digitisation regarded as the main driver of change that results in enormous managerial and organisational challenges" (Maijanen, von Rimscha, & Glowacki, 2019, p. 163). This recent research fails to cover the other media formats that have undergone digital tramsformation such as OOH.

Recent studies have focused on digital transformation as an enabler for change management in the face of digital disruption in the media industry mainly focusing on print and broadcasting (Donders et al. 2018 and Maijanen et al, 2019). The latest research done globally and locally on the OOH industry focuses on the digital transformation of the product such as DOOH and how technology has disrupted the product but there is no evidence as to how change management has been applied to the workforce to enable them in the face of this disruption and most importantly the newest disruption of programmatic DOOH.

1.3. Research purpose

The purpose of this research was to understand what change management capabilities are needed within an OOH media organisation's digital transformation process in order to remain relevant and compete within the digital ecosystem. The OOH organisation would require change management capabilities to ensure the successful implementation of digital transformation processes and initiatives. This research will aid the OOH organisations in understanding what change management capabilites are needed for digital transformation, as the business model evolves from an analog model to a hybrid business model of selling OOH inventory that will enable the organisation to be successful in the transition.

1.4. Research contribution

The research contributes to the strategic leadership; change management and digital transformation literature from the exploratory research conducted. The unique contribution that this study makes to this body of knowledge is that currently to the researcher's knowledge there is no extant literature on OOH organisations change management capabilities for digital transformation.

The research contributes to the traditional media business community, specifically the OOH business community. The findings of the research give insight into how organisations can utilise specific capabilities to prepare and enable an organisation for digitisation; digitalisation and digital transformation for relevance within the digital ecosystem.

1.5.   Roadmap of the research

There are 7 Chapters in this research project and they are structured as follows. Chapter 1 sets the context of the research project by providing background information to the research problem; providing an overview of the business and theoretical need of the research and the aim or purpose of the research. Chapter 2 provides a review of extant literature on the environments associated with the research problem and the theories of strategic leadership; change amangement and digital transformation. Chapter 3 introduces the research questions formulated from the literature review in Chapter 2. Chapter 4 provides a detailed understanding of the research methodology used for the research project. Chapter 5 presents the key findings from the interviews conducted. Chapter 6 discusses the findings from Chapter 5 in accordance with the extant literature reviewed in Chapter 2. Chapter 7 concludes the research project with princial conclusions of the study; contributions to research; recommendations for managers; limitations of the research and potential areas for future research. Figure 1 illustrates the structural outline of this research report.

Figure 1: Structural outline of this research report
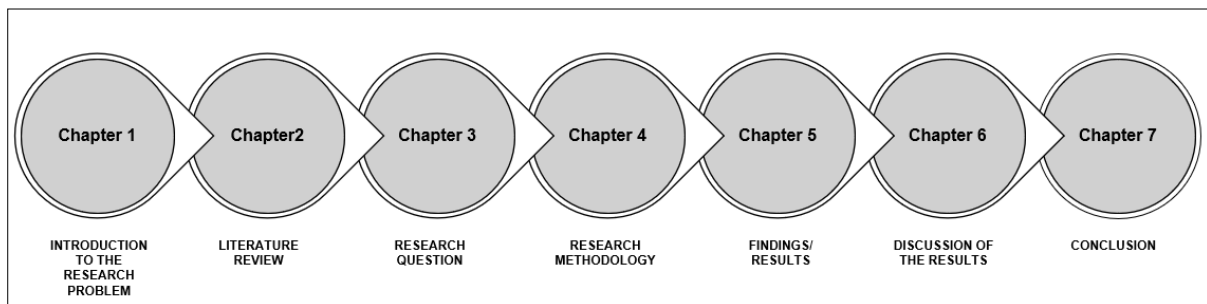
Source: Author's own

CHAPTER 2: LITERATURE REVIEW

2.1. Introduction

Chapter 2 reviews the extant literature that at the time of the research project, was available to be gain insight into the contextual themes and the key theories that aligned to the research problem presented in Chapter 1. Table 1 outlines the literature review roadmap for this chapter.

Table 1: Literature review roadmap for Chapter 2

Source: Author's own

2.2. Transformation of the media and advertising Industry

The launch of the internet and digitalisation of media platforms changed the media landscape at an alarming rate and the fate of traditional platforms was at technologies peril. Not only did the format of advertising change but also brought change to the advertising industry as a whole. Several authors agree that the introduction of the internet has changed the media and advertising industry. Huh and Malthouse explain that – "when the Internet entered our lives, for example, it brought radical changes in the advertising practice and advertising agency business and gave birth to the new subfield of Internet or online advertising, which morphed into interactive advertising, and then morphed again, now to digital advertising" and Kumar and Gupta stated that, "digitization has drastically transformed the overall media space, leading to increased investments in internet advertising" (Huh & Malthouse, 2020, p. 367 and Kumar & Gupta, 2016, p. 302).

Two main sources of media spend predictions and trends, MAGNA and GroupM have reported that, the digital media format is said to account for 64% and 60.4% respectively of global media spend, thus, linear media has to fight for what is left over in the advertiser's media budget (MAGNA, 2021 and GroupM, 2021). Thus, the impact of the digitisation of media has left traditional media in a vulnerable position with revenues going to digital media competitors.

A number of authors highlight how the effect of the internet and digital marketing has also changed how advertising is interpreted and defined. According to Helberger et al., historic academic research on the advertising and media industry was "mostly focused on advertising

agencies, examining agency creative philosophy, practitioner theories of advertising, agency ethics, and agency-client relationships, among others", however, "due to the recent digital technology revolution and advent of big data, advertising has transformed in fundamental ways, demanding completely new conceptualizations of what 'advertising' is and what constitutes the 'advertising industry'" (Helberger, Huh, Milne, Strycharz, & Sundaram, 2020, p. 377-378). With this, one of the main entities in the "new advertising ecosystem" falls under "new media platforms and content providers" and are "advertising technology companies" (Helberger, Huh, Milne, Strycharz, & Sundaram, 2020, p. 379). Deng et al. highlights this by referring to the programmatic evolution - "conventional advertising accentuates 'media buying' in that it places emphasis on purchasing advertising space from media providers through daily subscriptions or via cost per thousand (CPM) arrangements – consequently, advertising content broadcast across diverse media, at different time periods, and on separate occasions seldom differs in conventional advertising", and "in contrast, programmatic advertising concentrates on 'audience purchase' by aligning advertising content with consumer attributes" (Deng, Tan, Wang, & Pan, 2019, p. 356). Mokoena et al. emphasises and agrees with this by stating "the automation of marketing technologies provokes a move from media planning and buying towards audience planning" (Mokoena, Prinsloo, Gawlik, & Pelser, 2021).

With this transition of how media is purchased, the main views thus far on what programmatic advertising is with regards to "audience planning" or "audience purchase" can be defined as follows from several authors: programmatic buying of digital media, "uses data and technology and real-time auctions to automate transactions between buyers and sellers"; also known or referred to as "computational advertising"; driven by consumer data and "are indeed considered new oil, currency, and power in today's advertising"(Deng, Tan, Wang, & Pan, 2019, p. 356; Franks, Malthouse, & Maslowska, 2018, p. 769; Helberger, Huh, Milne, Strycharz, & Sundaram, 2020, p. 379-378 and Mokoena, Prinsloo, Gawlik, & Pelser, 2021). This transition to "audience purchase" and "audience planning" is verified by the increase in programmatic buying, which now accounts for over "80% of digital display ads bought" and is forecasted to be worth $155 billion in 2021 from $129.1 billion in 2020 (Deng, Tan, Wang, & Pan, 2019, p. 356; Mokoena, Prinsloo, Gawlik, & Pelser, 2021; eMarketer Editors, 2018 and Statista, 2021)). From this it is evident that there has been a significant shift of where digital advertising revenue is going.

According to Crittenden and Peterson, advancements in technologies and digital disruptions in the marketing environment, including the buying of media; the future of marketing education has become an important factor to consider when looking at the media landscape (Crittenden & Peterson, 2019). In addition to this, "Crittenden and Peterson (2019) point at the need for

interdisciplinary education of future advertising professionals" (Mokoena, Prinsloo, Gawlik, & Pelser, 2021, p. 17).

The main views on education in the marketing environment thus far and highlighted from authors are as follows. Crittenden et al. stated that "given the rapid and continuous digitalization of our economy, it is imperative that educators be at the forefront with curriculum tools and practical tools and in the transformation of our students into employees with the critical thinking, creative and inquiry skills needed to add value in a world in which machines will work alongside human professionals" (Crittenden, Biel, & Lovely III, 2019). And with reference to the local market, Mokoena et al. stated that "the abrupt tempo of digitalisation of the Marketing environment made simple adjustments of advertising agencies strategies ineffective (and) revolutionary changes affecting all parties of the hitherto value chain requires an adequate response" (Mokoena, Prinsloo, Gawlik, & Pelser, 2021, p. 5).

When looking at media buying and advertising agencies that are experiencing digital disruption implications, Mokoena et al. (2021) provides a framework for "marketing decision-makers with a broader perspective on their strongly digitalised business environment and permits a smoother transition of advertising agencies towards a new sustainable business model" (Mokoena, Prinsloo, Gawlik, & Pelser, 2021, p. 1). This study by Mokoena et al. (2021), was conducted to highlight the factors that are crucial for sustainability of the South African advertising industry in the digital age – highlighting "that ignoring the digital disruption by advertising agencies (AA) increases the risk of erroneous decision-making and losing ground to digitally savvy competitors" (Mokoena, Prinsloo, Gawlik, & Pelser, 2021, p. 1). To the researcher's knowledge this is the only framework available in extant literature for ma

The Critical Success Factors (CSF) framework developed from the study resulted "six factors significant for the operations of advertising agencies in the digital age" and these include the following: (i) characteristics of modern marketing; (ii) agency sustainability in the digital age; (iii) characteristics of effective advertising in the digital age; (iv) critical skills for advertising agencies to succeed in the digital age; (v) digital capabilities for agencies' success in the digital age; (vi) agency structure and process considerations for the digital age (Mokoena, Prinsloo, Gawlik, & Pelser, 2021, p. 18).

A global study conducted by Kane et al. on digital disruption reported that "key threats came from the market environment, in the form of product obsolescence, lower barriers to entry and eroding competitive advantage, and competitive pressure, including more intense competition, faster competitors, and new competitors" (Kane G., 2019). Education must not be limited to the advertising agencies; marketers and clients only. The traditional media owners have had to transform significantly in order to compete within the digital ecosystem. A number of authors

highlight this with reference to different industries that have been faced with digital disruption since the onset of online capabilities. Automation of processes for selling media inventory online have come to the forefront over the past decade as it aligns with advertiser's key performance indicators of measurement.

According to Karimi and Walter, "internet and digitization are changing the newspaper industry at an extraordinary pace" and "the convergence of inexpensive digital information goods and computing and communication devices are changing not only the newspaper industry but also business and society as a whole through five digital forces: globalization, millenialization, prosumerization, business virtualization, and platformization" (Karimi & Walter, 2015, p. 40). Newspaper incumbent firms faced the threat of extinction due to digital disruption, transformational strategies had to be put in place by "repositioning their core businesses by identifying the jobs that their customers want them to perform more easily, conveniently, or affordably" (Karimi & Walter, 2015, p. 44).

In addition to this, the traditional or linear broadcast television industry has been threatened by "video-on-demand" capabilities from digitisation by companies such as Netflix and Disney and is "changing the ways in which content is accessed by viewers and monetized by producers" (Haillay & Mateer, 2019, p. 166). Not only has the way the content is being watched has changed but also the way the audiences are commoditised for advertisers, "Traditional ways of buying TV advertising are being challenged by the programmatic approach, which originated with search and display ads, and uses data and technology and real-time auctions to automate transactions between buyers and sellers" (Franks, Malthouse, & Maslowska, 2018, p. 769).

Further to this, like television, radio broadcasting has had to transform due to the "increased competition from new media platforms and changing consumer expectations" (Beule, Hirschmeier, & Tilly, 2019, p. 5017). Radio companies need to "rethink their businesses to focus on how they can put radio and the full range of digital offerings to work for advertisers" (Ely, 2018).

A study on the German media industry conducted by Hess et al. (2016) established a framework for digital transformation strategy that helps managers to "capture the business value of digital transformation, companies should carefully formulate a digital transformation strategy that coordinates the many independent threads of digital transformation and helps them navigate the complexity and ambiguity of identifying their own digital 'sweet spots'" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 125). In this study, Hess et al. (2016) emphasises the importance of digital strategy and digital transformation of firms to remain "competitive in their industries, business leaders must formulate and execute strategies that embrace the

implications of digital transformation and drive better operational performance" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 123).

A matrix was developed to understand the levels of digital diversification at the German media companies, "the levels of diversification shown in Figure 2 (Figure 2) allow a media company to assess both its current level of digital transformation and the levels for possible future digital transformation endeavors". This study highlighted what the media firms "value creation" was from driving digital transformation: "changes in value creation relate mainly to the degree to which a company has already diversified its business into the digital world, how it plans to generate revenues from digital technologies and to its main business focus after a digital transformation" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 130).

Figure 2: Levels of diversification
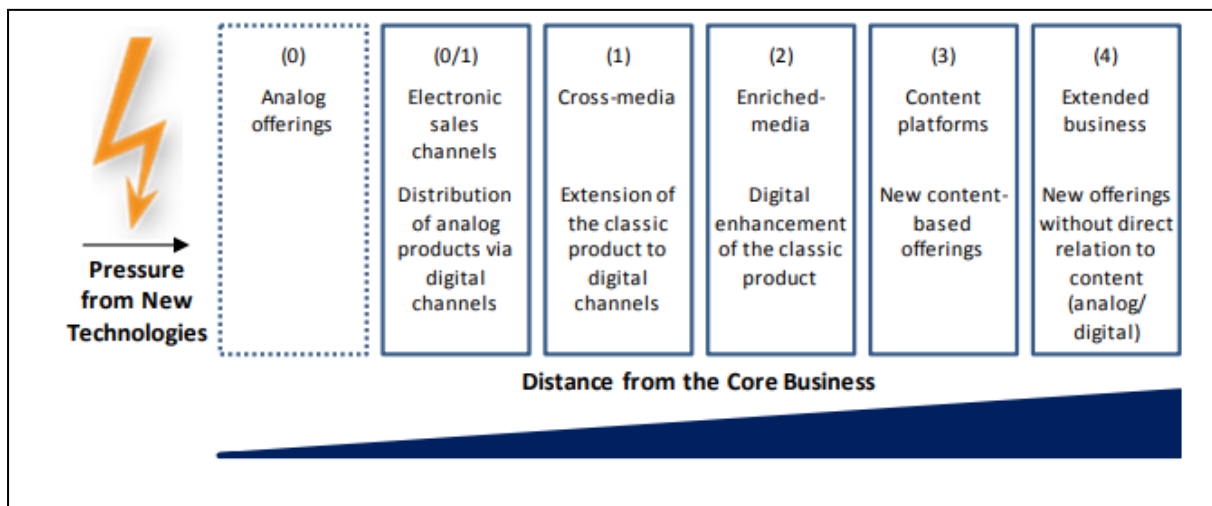
Source: (Hess, Matt, Benlian, & Wiesbock, 2016, p. 132)

Thus, it is evident from the above findings that digital disruption and technology has caused a revolutionary change in the media and advertising landscape as to how media is bought and the implications there of for the entire industry including advertising agencies; marketers; clients and media owners.

2.3.   Out-of-home media advertising

OOH media advertising is the truest and oldest form of physical media, the Outdoor Advertising Association of America (OAAA) define it as – "OOH is real – in today's world of clicks, likes, and page views, OOH is the real thing. It offers real-life impact in a digital world, and can't be blocked, skipped, or viewed by bots" (Out of Home Advertising Association of America, 2020). The definition of OOH media has progressed from billboard or outdoor media to encompass all advertising formats that are "non-domestic" and in the public domain (Roux, van der Walt, & Ehlers, 2013, p. 383). In addition to this, Taylor argues that "it is clear that the

modern out-of-home advertising industry is very different from the traditional 'outdoor industry'" (Taylor, 2015, p. 178).

Lee and Cho (2019) emphasise this difference by stating that "the rapid change in the media landscape owing to 'digitalization' has blurred the boundaries and domains among various advertising media, and this has fuelled a rapid growth in DOOH advertising executions utilizing digital convergence" (Lee & Cho, 2019, p. 97). Flys gives clarity on this transformation by indicating that OOH media advertising has over the past decade transformed from being the slowest medium to be the fastest advertising medium due to technological advancements and reports that OOH has had the "position as the oldest and most static of advertising mediums (both literally and figuratively) has been changed forever with the arrival of DOOH" (Flys, 2016). Thus, indicating that the OOH industry has revolutionised over the past decade and there have been major changes to the formats and definitions of the media types.

The main views on the OOH industry have been about what OOH is and the transformation of the product, including the benefits of the products. According to Roux, in South Africa studies have been done on the types of traditional formats of billboard advertising including "free-standing outdoor advertising media" and "minibus taxi advertising" but there has been no "holistic perspective to categorise or order all the different types of OOH advertising currently available in the country" (Roux, van der Walt, & Ehlers, 2013, p. 385). From these learnings and the research study, Roux had then formulated "a classification framework for OOH media advertising in South Africa" to include the following media platforms: "Outdoor advertising media; Transit advertising media; Street-and-retail-furniture advertising and Alternative OOH advertising" (Roux, van der Walt, & Ehlers, 2013, p. 387). Roux makes reference about DOOH advertising but due to limited sources on the topic of OOH "entering the digital era", the study excluded this development (Roux, van der Walt, & Ehlers, 2013, p. 384).

Further to this, DOOH was introduced into extant literature a few years later emphasising the impact of DOOH and how it is consumed. A number of authors highlight the growth of DOOH. Taylor states that "the advent of the digital billboard has clearly revolutionised the out-of-home industry" as it has "come into being at a time when many cities around the world are experiencing transformation and growth" (Taylor, 2015, p. 178). In a later research study, Roux tackles the DOOH format of OOH and the perspective of the DOOH in South Africa (Roux, 2018). The study outlined the benefits and qualities of DOOH advertising from the "perspectives of companies with expertise in DOOH advertising in the South African content" and was thus limited "from a consumer perspective" and also the digital transformation process of the companies was not outlined (Roux, 2018, p. 33). Outdoor Auditors, a South

African based company have audited a growth level for DOOH of 410% from 2014 to 2021 – this includes all DOOH that is larger than 18 sqm in South Africa (Warburg, 2021).

Furthermore, a study conducted in 2020 aimed to create "a conceptual framework for contemporary digital out-of-home advertising media" with the purpose of identifying DOOH media formats and "environments and implications when delivering communication in these settings" (Roux, Mposi, & van Zyl, 2020, p. 19). In 2020, Roux conducted further research with peers "to measure the effectiveness of out-of-home advertising campaigns in South Africa" and was "one of the first to shed light on OOH advertising industry measurement practices in South Africa" (Roux, Babst, & de Jager, 2020, p. 35). This latest research on OOH advertising in South Africa outlined the effects of OOH on marketing communication objectives from a consumer perspective (Roux, Babst, & de Jager, 2020, p. 41). In line with this theme of research, Taylor highlighted in 2015 that in the USA "public opinion polls document that typical members of the public find digital billboards to be attractive" and "highly valued by an overwhelming majority of the public" (Taylor, 2015, p. 178).

The benefits to the media planners and the consumers at large have been addressed with regards to recent research including the effectiveness of DOOH, plus the generation of revenue for the media owners who own the DOOH assets (Taylor 2015; Lee & Cho, 2019; Mposi, Roux, & van Zyl, 2020; Babst, Roux, & de Jager, 2020; Roux, 2018). Based on the researcher's research, there is no academic evidence on a global or local level to suggest how the advent of digitisation affected the OOH organisation and how the OOH companies implemented change management for digital transformation and more specifically to programmatic OOH advertising(Taylor 2015; Lee & Cho, 2019; Mposi, Roux, & van Zyl, 2020; Babst, Roux, & de Jager, 2020; Roux, 2018).

Research done on the OOH industry is limited both on a global and local level. Physical attributes of OOH and their effectiveness have been studied over the years, however to the researcher's knowledge on the literature review researched, there is no indication of research done on how to effectively digital transform the OOH company as a whole as it enters the digital ecosystem through change management.

2.4. Digital transformation

The main views from earlier literature define digital transformation as: "the use of technology to radically improve performance or reach of enterprises" "digital transformation is concerned with the changes digital technologies can bring about in a company's business model, which result in changed products or organizational structures or in the automation of processes" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 124 and Bonnet, Mcafee, & Westerman, 2014, p.

1). These definitions do no highlight the strategic value and implementation of digital technologies that is implicated through the digital transformation process.

A later definition follows with research done by Solberg et al. (2020) and Verhoef et al. (2021) that highlight the use of new or advanced technologies. According to Solberg et al. there are many studies that have researched digital transformation and have highlighted that "the push toward digital transformation is motivated by the belief that new technologies have great potential to drive innovation and competitive advantage" (Solberg, Traavik, & Wong, 2020, p. 106). The transition is explained from a study done by Verhoef et al (2021), where they explain that there are phases to digital transformation the first two being "digitization" and "digitalization", which are "more incremental phases are needed to attain the most pervasive phase of digital transformation" (Verhoef, et al., 2021, p. 891). Verhoef et al. then defines digital transformation as "digital transformation is a company-wide phenomenon with broad organizational implications in which, most notably, the core business model of the firm is subject to change through the use of digital technology" which links to Solberg et al. motivation of using new technologies (Verhoef, et al., 2021, p. 892). OOH is historically known as the slowest media platform in its traditional sense, however the acceleration of technologies of product and service in this industry drove the cost of digital signage down and opened the door for entrepreneurial firms to enter the market.

The business environment has become exceptionally competitive and digitisation or technological advancements are exhilarating the competitive landscape in the 21st Century. With the onset of digitisation and pureplay entrepreneurial platforms, old firms were faced with the reality that if they do not digitise, they will die. Processes and procedures have been automated across many industries to keep up with the attention and immediacy economy that digital has created for the customer. In the OOH industry, advancements in digital capabilities allowed for innovative products to be sold to clients; but OOH firms had to compete for the attention of the customer and had to act fast.

For the OOH organisation; a key example here is the evolution of the OOH product – it went from being analog, to digital, therefore opening up additional revenue streams on the same location by creating a network selling proposition to advertisers as opposed to having one client always on and being able to generate more revenue and improve performance through DOOH. For firms in the traditional OOH industry, "enterprises are exploring Industry 4.0 enablers - such as the Internet of Things (IoT), big data, smart sensors, cyber-physical systems, digitalization, automation and new algorithms – to retain and improve their strategic and organisational capabilities" (Bresciani, et al., 2020). Wrede et al. argues that not only do traditional firms need to remain relevant but the competition is high for survival due to new

entrants and demands from customers, they state the following "Established business models are challenged by changing customer expectations and behaviors, as well as new and rapidly growing market entrants with disruptive digital business ideas (Wrede, Velamuri, & Dauth, 2020). Thus, digital transformation is driven from new technologies; customer satisfaction; competition; innovation and the need for the business to survive the changing landscape.

In line with the above, Verhoef et al. (2021) explains that digital transformation is more aligned to incumbent firms "incumbents will face challenges and barriers when searching and implementing business model innovation for digital transformation given their legacy. They are often forced to deal with conflicts and trade-offs between existing and new ways of doing business" (Verhoef, et al., 2021, p. 892). In agreement with this the main views of insiturional logic are that an incumbent firm needs to deal with legacy challenges such as institutional logic which they define as firms having "existing identity, cultures, norms, behaviors, assets, organizational structures, processes, etc." and that "institutional logics are the rules of the game that constrain and shape the behavior of institutional actors and define the criteria for efficiency and effectiveness of institutions" (Altman & Tushman, 2017, p. 186 and Shekhar, Manoharan, & Rakshit, 2020, p. 62). This is important to align to the needs of an incumbent firm having to adapt to forces to ensure it remains relevant against the competitive landscape (Altman & Tushman, 2017, p. 186).

A number of authors agree that a strategic approach to digital transformation is important to drive the success of the change. An organisation needs to rethink and redesign it's positioning internally and externally, as stated by Burton-Jones et al., "digital transformation involves fundamentally rethinking an organization's processes, services, and roles from a technology-enabled perspective" (Burton-Jones, Casey, Draheim, & Eden, 2019, p. 1). Verhoef et al (2021) gives insight into this statement from Burton-Jones et al. (2019) with the "strategic imperatives of digital transformation" for organisations and these include: digital resources (assets; agility; networking capability and big data analytics capability); organisational structure (separate business units; agile organisational forms; digital functional areas); digital growth strategies and lastly metrics and goals (Verhoef, et al., 2021, pp. 892-895). With the above defined, it is evident that in order to achieve digital transformation, the organisation needs to have strategic alignment of products; processes and organisational structure. The Table 2 below is extracted from Verhoef et al. (2021) study that portrays the phases of digital transformation aligned to the strategic imperatives for clarity on the structure.

Table 2: Strategic imperatives according to phases of digital transformation

Strategic Imperatives according to Phases of Digital Transformation.

Type	Examples	Digital Resources	Organizational Structure	Digital Growth Strategies	Metrics	Goal
Digitization	Automated routines and tasks; Conversion of analog into digital information	Digital assets	Standard top-down hierarchy	Market penetration, (product-based) Market development, Product development	Traditional KPIs: Cost-to-serve, ROI, ROA	Cost savings: More efficient deployment of resources for existing activities.
Digitalization	Use of robots in production; Addition of digital components to product or service offering; Introduction of digital distribution and communication channels.	[Above] + Digital agility, Digital networking capability	Separate, agile units	[Above] + Platform-based market penetration, Co-creation platform	Traditional and Digital KPIs: User experience, Unique customers/users, active customers/users	Cost savings & increased revenues: More efficient production via business process re-engineering; Enhanced customer experience.
Digital transformation	Introduction of new business models like 'product-as-a-service', digital platforms, and pure data-driven business models	[Above] + Big data analytics capability	Separate units with flexible organizational forms, internalization of IT and analytical functional areas	[Above] + Platform diversification	Digital KPIs: Digital share, magnitude and momentum, co-creator sentiment	New cost-revenue model: Reconfiguration of assets to develop new business models.

Source: (Verhoef, et al., 2021, p. 892)

Research done by Vial (2019), states "that digital transformation is not" only about digitising products or processes, it is also about changes to structure and culture to ensure at the organisational level with research from Hess et al. (2016) there are "strategies that embrace the implications of digital transformation and drive better operational performance" (Vial, 2019, p. 118). According to Bonnet et al. (2014) firms "are transforming many parts of their organizations while others are still doing only the basics. Others are encountering organizational issues or other challenges that prevent them from transforming successfully". Both of these reviews on digital transformation align the need for digital transformation being at a cultural, personnel or employee level in the organisation. The identity and essence of the legacy of the firm is changing and it is important for leadership to ensure that there is complete buy in from all stakeholders considered. Education as to why transformation is happening is vital for buy in and conflict avoidance. New teams or talent may have to be brought in to assist the transformation and may leave employees feeling vulnerable to the changes.

Several authors agree on organisations being flexible the arguments by Bresciani et al. (2020); Verhoef et al. (2021) and Larjovuori et al. (2018) are as follows. The notion of adaptability is brought through the study done by Bresciani et al., the term "organisational adaptability" refers to an organisations business model changes through the "transfer of technological capabilities" (Bresciani, et al., 2020, p. 74). The adaptability can either be viewed from a short-term perspective for "value maximisation" or through a long-term approach for "innovation performance" (Bresciani, et al., 2020, p. 74). This is in agreement to what Verhoef et al. (2021) has indicated with regards to agility and capability for strategic imperatives for digital transformation (Verhoef, et al., 2021). It is important for organisations to focus on the long-term goals of creating value for all stake-holders while implementing the necessary short-term capabilities to safeguard itself against competition. Thus, from this It is clear that the ecosystem of the organisation needs to be flexible; agile and adaptable through digital transformation in order to remain relevant in an ever-changing world that is fast passed and needs constant monitoring.

The main views thus far on business model transformation aligning to digital transformation are found in the research done by Larjovuori et al. (2018); Benlian et al. (2016) and Gurbaxani & Dunkle (2019). Here the main findings are aligned to a "strategic approach to digital transformation" , where "managers must be able to challenge how the organisations operate, engage their personnel in the process of redefining their work roles, and keep their minds open to the possibility that their roles will change as well", and emphasis is made on "changed products or organizational structures or in the automation of processes", and that is important to consider the enablement that digital technologies bring, "digital technologies enable the development of new or enhanced products and services delivered to customers more efficiently" (Larjovuori, Bordi, & Heikkila-Tammi, 2018; Benlian, Hess, Matt, & Wiesbock, 2016, p. 124 and Gurbaxani & Dunkle, 2019, p. 209) . Thus, this aligns to the need of transforming processes for performance. This is particularly evident for OOH organisations that have progressed with DOOH product platforms by opting to use automation software platforms to sell to advertisers that require this way of buying based on programmatic developments in the online environment of advertising that offers speed and agility.

The main views thus far by authors regarding innovation and digital transformation are that "the push toward digital transformation is motivated by the belief that new technologies have great potential to drive innovation and competitive advantage" and that "innovation is rapidly becoming a key strategic implementation driver for organisations as we advance further into this century". (Solberg, Traavik, & Wong, 2020, p. 106 and Abdulkadir, Chong, & Palladan, 2016). Thus, this indicates that business environment has become exceptionally competitive and digitisation or technological advancements are exhilarating the competitive landscape in the 21st Century.

According to Altman and Tushman, their research required further understanding of what challenges there are to strategic leadership with having a "hybrid product, services, or reseller organization" (Altman & Tushman, 2017, p. 199). In addition to this "there is no clear understanding of which organisational choices are more effective in allowing traditional companies to integrate new digital competencies" (Appio, Frattini, Neirotti, & Petruzzelli, 2021, p. 5). Verhoef et al. suggests "separate business units" for to deal with conflicts that would arise in an incumbent firm, "business model innovation research recommends to develop such new and often disruptive business models in autonomous business units that are separated from the headquarters, allowing for experimentation and quick learning, as well as avoiding cannibalization perils and conflicts" (Verhoef, et al., 2021, p. 893).

The literature above indicates commonality regarding digital transformation in order for an organisation to establish itself with the adopted digital environment. Reviewed journals

indicate that digital transformation is vital for an organisation to be successful in the digital ecosystem, and it is imperative that the workforce and not just the products that are evolved in the process and onset of digital disruption.

2.5.   Strategic leadership and digital transformation

Early research defines strategic leadership "as translating an organisation's vision into reality" through focusing on interpersonal skills and not the organisation or firm as a whole (Hooiberg & Lane, 2014). According to Hooijberg and Lane (2014), academics Bass and Rowe's early research on strategic leadership had drawbacks that do not focus on the organisation as a whole (Bass, 2007 and Rowe, 2001). Strategic leadership theories have evolved over the decades to include the importance of "leader behaviour on performance of groups and organisations" (Carter & Greer, 2013). Based on this evidence, one can establish a starting point for a traditional mature organisation that has been established for many years, where there were simple rules and procedures of how to go about business. Before the world encountered the 4th Industrial Revolution, the pace of business was much slower and a firm would look at a top-down approach to lead it to success in a much smaller market than we find ourselves in today.

The evolution of strategic leadership capabilities for the 21st Century described by Hitt et al. (1998) and Ireland and Hitt (1999) outlined the factors "that effective strategic leaders" needed to in "order to be successful in the competitive landscape" – these focused more on the organisation in comparison to earlier literature that focused on self (Hitt, Haynes, & Serpa, 2010). After consideration of the first 10 years of the 21st century, it has become more apparent that entrepreneurship and innovation are additional capabilities that are needed within an organisation's strategic leadership positioning (Hitt, Haynes, & Serpa, 2010).

A number of author's describe the change of the leadership's role over the past decades, emphasising that strategic leadership needs to be agile and enabling with leaders focusing on both internal and external factors. Historically firms proclaimed an "order response" to the changes in the environment, going back to old ways – however in the dynamic environment firms find themselves in today, an "adaptive response" is required which "capitalises on the collective intelligence of groups and networks" (Uhl-Bien & Arena, 2017). Historically leaders were classified under the following styles of leadership: transactional; transformational; charismatic; authentic; servant and responsible (Carter & Greer, 2013). Today the focus is on the organisation where the following types of leadership are outlined: "operational leadership; entrepreneurial leadership and enabling leadership" and Wrede et al. explains that "in present times, top managers are particularly challenged to ensure the competitiveness of their firm by formulating and executing a business strategy that considers the opportunities and risks of the

digital transformation (Uhl-Bien & Arena, 2017 and Wrede, Velamuri, & Dauth, 2020, p. 1551) What we see with these two definitions is that they encompass the organisation as a whole and not just on the self – which allows for effective strategic implementation.

A recent main view on strategic leadership aligns to the need of the leadership being digital savvy or fluent. When it comes to digital transformation and leadership, Wrede et al. (2020) research on top managers was brought about for the need "a deeper investigation of top managers in firms' digital transformation processes" as there is a scarcity of existing research "When taking a closer look at the academic literature, however, it becomes evident that studies investigating the antecedents and consequences of top managers' characteristics and behaviors have considered digitalization aspects only rarely" (Wrede, Velamuri, & Dauth, 2020, p. 1551).

These studies reviewed by Wrede et al. (2020) about top managers include: top managers directly influence innovation in firms by determining a firm's innovation strategy and resource commitment; they recognise new business opportunities; they have been associated with firms' commitment to the status quo; corporate strategic change and risk taking; play a critical role in business model innovation and in leading organisational change processes and finally, the relevance of top managers support and commitment for firms' value creation from information technologies (Wrede, Velamuri, & Dauth, 2020, p. 1551). Kane et al argues that "Leaders need digital literacy; they need to understand what blockchain and AI and VR and AR and autonomous vehicles can do in their relative timelines. But they themselves don't need to develop AI algorithms or do big data analysis. What they need is a working knowledge of the business value and application of these technologies, what I call digital literacy" (Kane G. , 2019, p. 46).

Wrede et al. (2020) research places significance on the leadership role of the firms' in so far as "top managers play a key role in firms' digital transformation as they facilitate the necessary establishment of an organizational structure and culture that jointly embrace the challenges and opportunities underlying this significant period of change" (Wrede, Velamuri, & Dauth, 2020, p. 1563). In addition to this, Wrede et al. (2020) give emphasis to commitment and trust – "our findings underline the importance of leadership in this transition period. It is the responsibility of leaders to build an organizational culture in which change is embraced, and everyone feels included, supported, and enabled" (Wrede, Velamuri, & Dauth, 2020, p. 1563). The two key dimensions that Wrede et al. (2020) has defined for top managers roles are: "understanding digitalization" and "setting the formal context for digitalization" within the firm (Wrede, Velamuri, & Dauth, 2020, p. 1556).

Top managers roles have to deal with the "multifaceted nature" of digital transformation within a firm "top managers first (need to) develop a deep understanding about digitalization topics and the implications for the firm themselves, before making choices that affect the organization in both formal (i.e., organizational design) and informal (i.e., organizational culture and relationships) ways (Wrede, Velamuri, & Dauth, 2020, p. 1563). The three main themes that came up for "leading change" in Wrede et al (2020) research was: signalling personal commitment; involving others in the digital journey and building trust and commitment (Wrede, Velamuri, & Dauth, 2020, p. 1556).

In line with the above research, a research study done on the maturity assessment of digital transformation done by Gokalp and Martinez (2021) highlights the importance of leadership as stated above, they believe that "strategic governance" is a key factor and that "digital transformation strategy needs to be led from the top, with a strong, clear, and inspiring vision of how emerging technologies can create a new future with shared value", in addition "roadmap should be generated based on the vision, and related governance activities should be performed" (Gokalp & Martinez, 2021, p. 7).

In conclusion the literature review on strategic leadership aligns to how strategic leadership has evolved over the past and the need of transformation or transition happening throughout the organisation, not just at a product or process level to ensure that as a whole the organisation it is enabled for the digital environment through effective leadership aligned to digital transformation.

2.6.   Change management for digital transformation

A number of authors have argued that here is more to digital transformation than just digitising and digitilising products and processes. Philip argues that "digital transformation is primarily studied through the lens of information technology and strategic management", however "there should be an integration of leadership concepts into this topic considering that corporate leaders are heavily involved in creating a new vision and implementing plans for the transformation" (Philip, 2021, p. 1). Rad and Porfirio et al. highlight that if an organisation has the capabilities in place, digital transformation drives an organisation to change (Rad, 2017, and Porfirio, Carrilho, Felicio, & Jardom, 2021). They state the following "when [media] industry ecosystem incumbents have dynamic organizational capability and make necessary strategic changes, they could exploit disruptive innovations"; and that "managers' cognitive capabilities, dynamic organizational capabilities, and strategic changes are three variables" that are important to digital disruption; and finally that "digital transformation forces companies and industries into organizational changes and critical business adaptations if they want to survive and prosper" (Rad, 2017, p. 2 and Porfirio, Carrilho, Felicio, & Jardom, 2021, p. 610).

Strategy has been highlighted by Porfirio et al. where they establish key developments in a company that promote digital transformation these include: strategy; leadership and company characteristics (Porfirio, Carrilho, Felicio, & Jardom, 2021, p. 611). With this in mind, a distinction is made by Hess et al. (2016) with regards to a digital strategy which encompasses a firm's vision for the future, vs a digital transformation strategy which "guides managers though the transformation process resulting from the integration and use of digital technologies", here Hess et al. clearly states that an organisation should have "a standalone digital transformation strategy" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 125).

A number of authors have developed frameworks; strategies or systems to tackle the implementation of digital transformation where enablers and stages are identified from the leadership and the organisation itself. Successful strategic leadership frameworks and models for digital transformation or adaptation have come to the forefront over the past 5 years with the dynamic business environments brought on by automation and advanced technologies. Three key frameworks and processes that have been identified for change management and strategic positioning of digital transformation are from the authors Hess et al. (2016), Chanias et al. (2019) and Porfirio et al. (2021).

Firstly, Hess et al. (2016) had developed a framework for digital transformation that addresses a "holistic approach to the development of a company-wide digital transformation strategy" that "identifies four key dimensions of every digital transformation endeavor" and are listed below (Hess, Matt, Benlian, & Wiesbock, 2016, p. 124).

1. *The use of technologies reflects a firm's approach and capability to explore and exploit new digital technologies.*
2. *Changes in value creation reflects the influence of digital transformation on a firm's value creation.*
3. *Structural changes refer to the modifications in organizational structures, processes and skill sets that are necessary to cope with and exploit new technologies.*
4. *The financial aspects dimension relates to both a firm's need for action in response to a struggling core business as well as its ability to finance a digital transformation endeavor.*
   (Hess, Matt, Benlian, & Wiesbock, 2016, p. 124)

Further to this, research conducted by Chanias et al. (2019) on digital transformation strategy (DTS) allowed for the development of a strategy that goes beyond "formulation and implementation", whereby creating "an integrated process/activity model showing how pre-digital organisations can develop a DTS" (Chanias, Myers, & Hess, 2019, p. 18). The findings

from the research established "DTS as an emerging strategy where human agents engage in episodes of digital strategy making, but these episodes are under steady influences from external and internal contexts of the organization and might also have back couplings on these organizational contexts" (Chanias, Myers, & Hess, 2019, p. 28). The key take out from this research is that "DTS is a "moving target" that seems to be continuously in the making, with no foreseeable end" which adds to the research presented by Hess et al. (2016). The table below is an extract from the research which describes "the integrated process/activity model and its elements" (Chanias, Myers, & Hess, 2019, p. 28).

Table 3: Integrated process/activity model

Practice	Explanation and Examples
Setting up digital transformation governance structures	Specific digital transformation governance structures (HDT, DTU, digital transformation board, and a judging panel) created to steer and execute digital transformation efforts under the direct responsibility of the CEO
Meeting regularly across functional boundaries and holding workshops involving multiple organizational levels	Regular meeting formats for internal alignment and decision making with representatives from the DTU, IT, HR and top management as well as ad-hoc meetings and management workshops including top management, divisional management, middle management and in some cases lower-level employees
Outlining and communicating the DTS, using a variety of media and channels	Presentation outlining the DTS based on a leitmotif, a target picture, and two building blocks for implementation, as well as a variety of communications measures including a communications campaign using intranet postings of videos and manuals, mailings to all employees, distribution of posters or physical idea submission sheets
Working business and customer-centric as well as agile and innovation-oriented	Business and customer-centric perspective taken throughout all transformational efforts, project management of the DTU inspired by agile and innovation methods, and the digital innovation process relying on procedures from the start-up industry
Networking, collaborating, and exchanging knowledge on digital transformation	Networking and collaborating with digital transformation experts, consultants, (digital) service providers, PropTech start-ups, as well as managers from key competitors with digital transformation responsibilities

Source: (Chanias, Myers, & Hess, 2019, p. 29)

Porfirio et al. have developed a model that confirms "the main characteristics determining the pace of DT are related to the size of the company, its internationalization level, and the ownership of capital"; with reporting that "the impact of digital transformation on business organizations is technology-enabled, but that it is always led by managers, and oriented for people" (Porfirio, Carrilho, Felicio, & Jardom, 2021, pp. 616-617). This more recent model of stages of digital transformation in comparison to Hess et al. (2016) and Chanias et al. (2019) includes the revenue generated from the digital transformation successes as a trigger of where the organisation is headed in the future. A key differentiator in the model by Porfirio et al. is "that it considers the relationship between digital strategy and corporate and business strategy, according to firm and management characteristics" (Porfirio, Carrilho, Felicio, & Jardom, 2021, pp. 610). Table 4 below indicates the 4 conceptual stages of Porfirio et al. digital transformation model.

Table 4: Conceptual stages of DT

Stage of DT	Brief description of conditions to be observed	Notes
Stage 1	Relevance of digital strategy to corporate strategy	The first and most basic stage of DT corresponds to a broader recognition of the need, and a basic conceptualization of DT, for the firm's development. Some isolated initiatives are taken in that regard. First actions and basic investments are considered to prepare the company for digital challenges at a corporate level. Investment amounts for IT and IS systems are planned. Some decisions like the definition of a digital strategy, or the hiring of a CDO or a CIO, may be considered to put together isolated actions towards DT. At this stage, level of investment in DT is still basic, considering that the firm is yet at the level of conceptualization of its digital initiatives. This scenario may occur independently from the situations where the company already has a web site, a presence on social media or even operates with certain levels of ecommerce, just representing a small percentage of its sales.
Stage 2	Relevance of digital strategy for corporate and business strategy	In the second stage of DT firms are more concrete about DT. Corporate initiatives for DT are transformed in business actions, usually for specific commercial initiatives although most of the changes are as yet still internal. A concrete digital business strategy (Bharadwaj et al., 2013) starts to be applied to transform the way business operates and will relate with its main stakeholders in the future. Investments in IT and IS, linked to the usual corporate and business strategy,y start to grow in a coordinated way, following some concrete plan that usually tends to congregate the different initiatives towards DT. However, they are still residual, compared to the overall level of the company's budget. IS and IT are usually the priority and the basis for the future change and innovation that characterizes the next step of DT
Stage 3	Perceived level of innovations derived from digital strategy	The third stage of DT consists of the translation of corporate and digital business strategy into concrete visible business and or process innovations by exploiting IT and IS potential. The company truly starts to change the way it operates and delivers their products/services. A digital culture starts to flourish, related to the way people socialize, communicate, and operate within and outside the firm's boundaries. At this stage, it is normal to see a redefinition of the company's business model and the development of new Value Propositions and/or product/service offers resulting from DT. A smooth balance shift between the level of sales from e-business when compared to the traditional commercial physical (bricks-and-mortar) channels starts to occur.
Stage 4	Relevance of investments in digital strategy	In the last stage of DT, digital strategy oriented by a dominant digital culture becomes predominant and embraces both corporate and business strategy. The level of innovations coming from DT become very relevant, and investments are also very significant, even predominant. Some previously bricks-and-mortar businesses start to be offered solely virtually, the physical business tends to be in the minority, and this clearly translates into the levels of income from DT initiatives.

Source: (Porfirio, Carrilho, Felicio, & Jardom, 2021, p. 613)

In addition to the studies from Hess et al. (2016); Chanias et al. (2019) and Porfirio et al. (2021), recent research has highlighted the importance of skills; knowledge and education for capabilities of digital transformation. Scuotto et al. argues that "internal digital capabilities [are] imperative to respond rapidly to market changes" and that at a micro-level there is a need for "digital skills in three main dimensions: 1. Information, 2. Communication, and 3. Software skills" (Scuotto, Nicotra, Del Giudice, Krueger, & Gregori, 2021). Conclusions from this study reflect on the need to understand "the roles of management in successfully (or unsuccessfully) exploiting these digital skills" and "the strategic posture of a firm matter" (Scuotto, Nicotra, Del Giudice, Krueger, & Gregori, 2021, p. 389). In addition to this, Gokalp & Martinez (2021) have created a "process dimension" for digital transformation which includes "workforce management", whereby this dimension includes the following: HR skills development; organisational structure management; sustainable learning management and organisational change management (Gokalp & Martinez, 2021, p. 8).

According to the authors Oswald & Kleinemeier (2016), Solberg et al. (2020) and Jones et al. (2021) there is more that needs to be understood regarding the actual work that needs to be done and the affect digital transformation has on the people of the organisation. Oswald & Kleinemeier, identify that there are implications on the employees; "it is crucial for leaders to understand the implications of digitisation on their organisation and employees" in the dynamic market, especially for an incumbent organisation (Oswald & Kleinemeier, 2016, p. 69). Solberg et al. then magnifies the need for understanding engagement or disengagement from the digital transformation process from employees of the organisation, and states that there is

little research that has been done or "has been addressed why and how employees voluntarily and actively engage in the digital transformation process" or "why and how employees may actively avoid or withdraw from this process" (Solberg, Traavik, & Wong, 2020, p. 106).

In accordance with this, Jones et al. highlights that the frameworks and strategies are vital for success, they add that "they oversimplify and underestimate the adaptive work of repairing the cognitive barriers to bringing about digital transformation in the first place", in addition they state that "effective digital transformation starts and ends with people in mind as the true catalysts and facilitators of change" (Jones, Hutcheson, & Camba, 2021, p. 938). In order to understand the level of complexity associated with change management within a firm or organisation, it is imperative to acknowledge that the need for digital transformation is highlighted from top-down as per the research, but the success of digital transformation needs to be brought about throughout all individuals within the organisation. Thus, an understanding of enablers and barriers to the digital transformation process is importnant to acknowledge.

The main views thus far on an organisations culture and mindset for digital transformation are that organizational culture must encourage digitisation and "establish a digital mindset throughout the whole organisation and at all hierarchical levels", added to this, it is important to implement "a digital culture during a digital transformation" of an organisation at the onset of strategy based on the following factors: "by ignoring culture, an organisation risks transformation failure; a digital culture empowers people to deliver results faster and a digital culture attracts talent" (Oswald & Kleinemeier, 2016, p. 78 and Ahern, Danoesastro, Hemerling, Stutts, & Kilmann, 2018).

Further to this, as identified by Gokalp & Martinez (2021) research earlier, "workforce management" must be included in the digital transformation process, where "cultural change should be implemented before the process transformation begins" "cultural change should be implemented before the process transformation begins". In line with this argument, recent research conducted by Jones et al. highlights how the mindset and culture of an organisation may create barriers to digital transformation, stating that "leaders need to not only look at the tension of physical and digital systems, but of the tension of pervasive mindsets already embedded in the organization's culture" (Jones, Hutcheson, & Camba, 2021, p. 940). As highlighted earlier, with regards to the frameworks; processes; strategies and models of digital transformation - roles may change - and it is imperative that firms upskill their workforce and prepare the employees for the change where possible. Thus, having a culture and mindset that is conditioned for digital transformation may aid in the success of the change.

When an organisation goes through the process of change management for digital transformation, there may be additional barriers other than culture and mindset that may be a

problem and could delay or prevent the digital transformation from occurring. A number of authors highlighted the reality of barriers to digital transformation and how to overcome them. Verhoef et al notes that this is more apparent in the incumbent firms where "They are often forced to deal with conflicts and trade-offs between existing and new ways of doing business" (Verhoef, et al., 2021, p. 892). In accordance with this, the study by Jones et al. explains the existence of barriers as "inevitable need to deal with the tensions that result from interweaving physical and digital layers into business models that originate from a pure physical world" (Jones, Hutcheson, & Camba, 2021, p.938). Although Jones et al. research was conducted for understanding digital transformation in manufacturing industries, various studies were examined in their research that identified the top 3 barriers to digital transformation and they are depicted below in Figure 3, each illustration depicts the top three barriers as listed and described in the Jones et al. article. (Jones, Hutcheson, & Camba, 2021).

Figure 3: Major barriers to digital transformation according to various studies
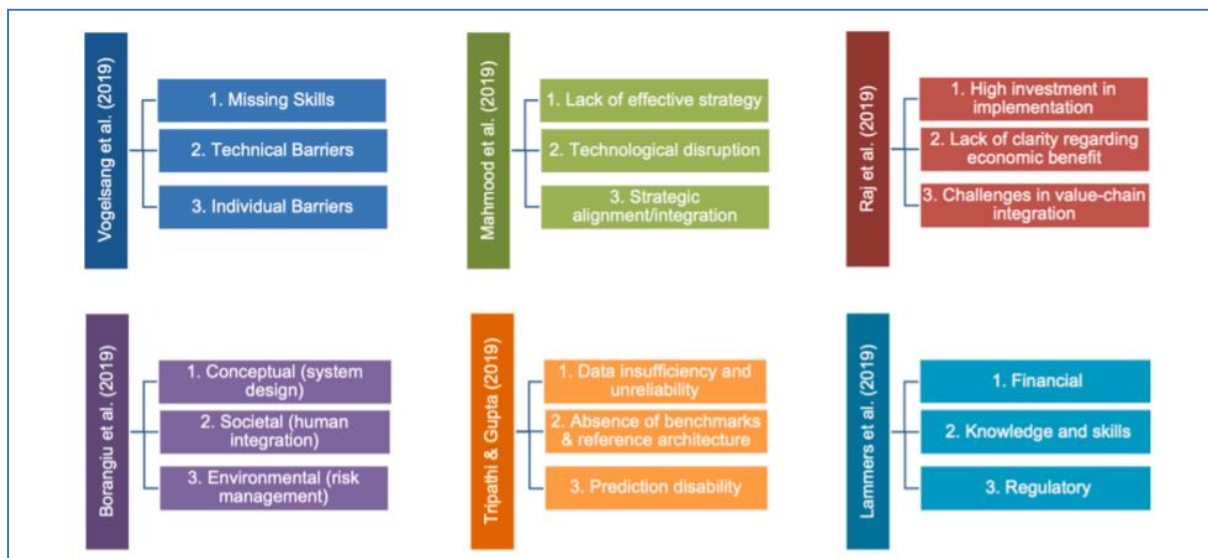
Source: (Jones, Hutcheson, & Camba, 2021)

Authors agree that there are varying levels, stages or processes of digital transformation. Hess et al. and Verhoef et al. discuss that an organisation may progress through the initial stages and then completely transform to a digital one, or have the option to integrate new technologies or to create separate structures for digital transformation (Hess, Matt, Benlian, & Wiesbock, 2016 and Verhoef, et al., 2021). Although argued by Hess et al., it is not easy to identify what apporach to take, based on previous studies reviewed by Hess et al., they "suggest that the greater the distance between digital transformation efforts and a firm's current core activities, the stronger the boundary between new and old operations should be." (Hess, Matt, Benlian, & Wiesbock, 2016, p. 134). With this, it is stated that "gradual, core business-related transformations, integration into existing structures should be preferred, but

only if the change processes are strongly supported by top management" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 134). This goes back to the theory of strategic leadership for digital transformation as reviewed above. Hess et al. and Verhoef et al. both convey that digital transformation changes the organisations whether there is integration or separate units formed and Hess et al states "all of which may be difficult to accommodate within existing organizational structures" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 134 and Verhoef, et al., 2021).

The main views thus far on talent as an enabler through change management identify hiring or renting of talent needed for digital transformation and attracting the right talent. Firstly, research identifies that talent can be hired or rented to kick start the digital transformation process, whereby Kane et al. states that "these are outside leaders with deep digital transformation experience who can provide the needed expertise and perspective" and that "once the digital initiatives began to flourish, the team used the successes to serve as a proof of concept to begin driving change across the organization" (Kane, Phillips, Copulsky, & Andrus, 2019, p. 37). Secondly, with regards to attracting talent, Verhoef et al. states that "digital transformation implies the attraction of employees with digital and analytical skills that may replace existing workforce" with this in mind, "one key challenge for incumbents is to compete for talent with these skills with new digital entrants" (Verhoef, et al., 2021, p. 893). Thus, an organisation must understand if it has capable employees or if it must look externally for the skill sets needed. In addition to this, once an organisation has reached a level of digital maturity, it will be seen as an attractor of the right talent.

Change management has been researched extensively over the past decade in relation to digital transformation on an industry or organisation, including the media industry but with no research done on change management on an OOH media company. The literature aligns to the need of transformational change from top-down, including strategy for organisational and structural changes and including upskilling, education and knowledge

2.7.   Literature themes aligned with the research question

After analysing the extant literature in the field of Corporate Strategy and other sources relating to the research, the following themes, contexts and theories are of relevance to the research project at hand:

- The Media Industry
    - In particular to how the media industry has been revolutionised due to digital disruption.
- The OOH Media Industry

- - In particular to how the OOH media industry has been revolutionised due to digital disruption.
- Digital Transformation
    - - How digital transformation is a necessity for survival.
- Strategic Leadership
    - - How Strategic Leadership enables digital transformation.
- Change Management
    - - How Change Management enables digital transformation.

2.8. Conclusion

Based on the literature review and the themes that have been identified and outlined in this chapter for the research question, the Table 5 below outlines a conceptual framework for the study that consolidates the key constructs and themes from this chapter in alignment to the purpose or aim of the research outlined in Chapter 1.

Table 5: Conceptual framework
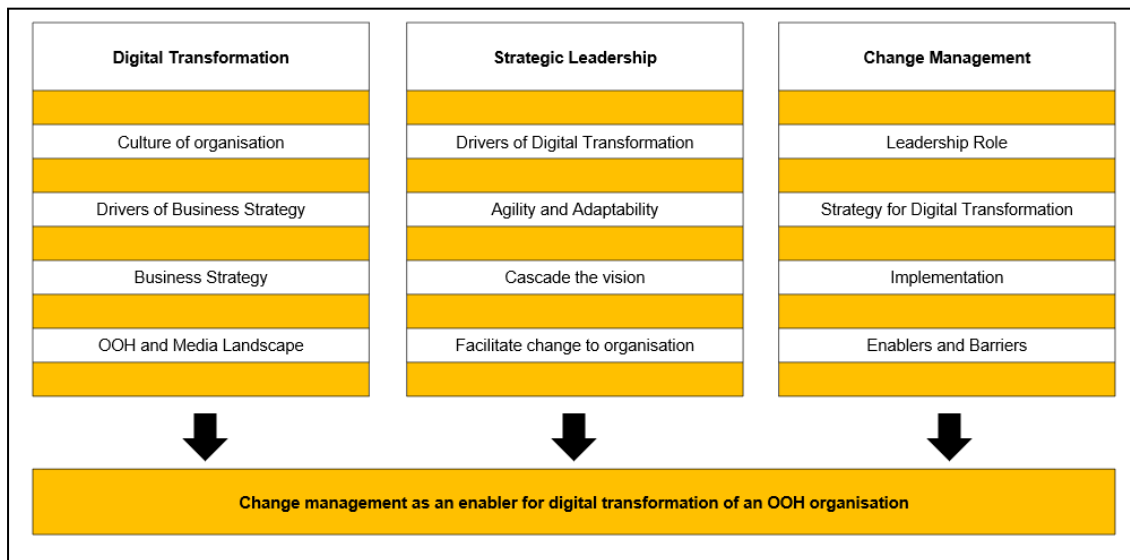
Source: Author's own

CHAPTER 3: RESEARCH QUESTIONS

3.1.   Introduction

This chapter presents the research questions that will be answered in this research report.

3.2.   Research Questions

Having looked at the business need from an industry perspective and an in-depth literature review on key constructs, off the anchors of the evolution of OOH advertising; digital transformation and change management. A research question has been formulated to extend on the field of corporate strategy in the theory of strategic leadership capabilities for the research aim to understand how an OOH business can successfully implement change management capabilities through digital transformation to ensure success of a hybrid business model.

Research Question:

The central Research Question is: How can change management capabilities of an OOH company influence the success of digital transformation for the organisation with a hybrid business strategy.

The following are sub-questions to the central research question:

RQ1. How are OOH companies approaching digital transformation?

Developed from Chapter 2 on the theory of digital transformation; the context of the media landscape and the OOH media landscape. RQ1 was developed from the extant literature of Solberg et al. (2020), Shekhar et al. (2020) and Wrede et al. (2020).

RQ2. What change management capabilities are OOH companies applying?

Developed from Chapter 2 on the theory of change management for digital transformation and the theory of strategic leadership. RQ2 was developed from the extant literature of Wrede et al. (2020); Gokalp and Martinez (2021); Hess et al. (2016); Chanias et al. (2019); Verhoef et al. (2021) and Libert et al. (2016); Crittenden et al. (2019) Porfirio et al. (2021), and Mokoena et al. (2021).

RQ3. What is the success from change management and digital transformation capabilities that OOH companies have tried to apply?

Developed from Chapter 2 on the theory of change management and the context of the media landscape and the OOH media landscape. RQ3 was developed from the extant literature of

Chanias et al. (2019), Porfirio et al. (2021), Hess et al. (2016) Crittenden et al. (2019), Mokoena et al. (2021), Kane et al. (2020) and Verhoef et al. (2021).

CHAPTER 4: RESEARCH METHODOLOGY

4.1.   Introduction

This chapter sets out the methodology that was used to conduct the research for the research project.

4.2.   Research design

Theory is the part of the research process where the establishment of concepts or variables are used for the research – it is used "as a way of explaining observed patterns of associations between phenomena" (Bell, Bryman, & Harley, 2019, p. 19). According to Bell et al. theory refers to historical or background literature that is "used to define the research agenda" (Bell, Bryman, & Harley, 2019, p. 19). The analysis from the literature review positioned the research towards a proposed research question off the anchor of digital transformation of a mature incumbent firm. With the OOH industry being the last adopter of product platform in the traditional linear media industry, with the adoption of programmatic selling, there is a need to understand and explore how the large incumbent firms of linear media have transitioned or transformed their institutional logic through strategic leadership capabilities in light of the competing business models and if they have been successful or unsuccessful in this pursuit, based on the existing literature on digital transformation and change management.

Having established that the research will be based on exploratory concepts or variables from background literature, an inductive approach was taken in this research to establish the "relationship between the theory and research" (Bell, Bryman, & Harley, 2019, p. 20). According to Eisenhardt "an essential feature of theory building is comparison of the emergent concepts, theory, or hypotheses with the extant literature" (Eisenhardt, 1989).

A philosophical paradigm needed to be followed to conduct research in business as it shapes the research agenda. Epistemology is "defined as the theory of knowledge" and "is the philosophical study of nature, origin, and limits of human knowledge" (Stroll & Martinich, 2021). From the interpretations of "theoretical considerations", a hypothesis or hypotheses that will be deduced in order to be tested by "empirical scrutiny", which is known as a positivists approach to research will be conducted in this research (Bell, Bryman, & Harley, 2019, p. 20). With a thorough literature review on contemporary or 21st century key strategic leadership capabilities and institutional logic transition understandings, the research agenda is positioned to extend theory in the corporate strategy field related to an incumbent firm choosing to maintain a hybrid strategy. Because a positivist approach will be utilised, according to Bell et al. inductive strategy also "plays an important role in the research process" as "knowledge is arrived at by gathering facts that provide the basis for laws" (Bell, Bryman, & Harley, 2019).

From the collection of data in this research there may be additional knowledge gained from the pragmatist approach that is action orientated to achieve certain results which is in line with Eisenhardt's position on qualitative research (Eisenhardt, 1989).

Qualitative research methodologies are defined as "research methodologies that deal with phenomena by analysing experiences, behaviours and relations without the use of statistics and mathematics and the processing of numerical data" (Basias & Pollalis, 2018, p. 94). A qualitative approach will be taken for this research strategy as there is a need to be a deep understanding of what was done, or how it can be adapted in an OOH company through its strategic management capabilities to bring about digital transformation. One of the factors of the adoption of qualitative methodology for this research "provide(s) a methodological approach that allows researchers to obtain a deeper understanding of these concepts across time and cultures" (Crane, Henriques, & Husted, 2018, pp. 4-5).

4.3. Population

The research was conducted in South Africa, across traditional incumbent and entrepreneurial OOH media companies that sell or are about to sell their DOOH inventory on some form of "platform; open/user innovation or ecosystem strategy" whether entirely or through hybrid strategies, and is aligned to the research done by Altman and Tushman. (Altman & Tushman, 2017). South Africa was the site of research due to the uniqueness of the country. It is an emerging market that possesses unique attributes to the study including and not limited to factors such as load shedding and market penetration.

The research focused on four OOH companies: two that have been in business for over 20 years that have sold both static OOH and DOOH; and two that have only sold DOOH and been in business for less than 10 years. The companies chosen were companies that are registered and are members of the Out-of-Home Media South Africa (OHMSA) which is the trade association for the Out-of-home media industry or from the South African Out-of-home Measurement Council (OMC) (OMC, 2021 and OHMSA, 2021). It was also vital that the 4 OOH companies all have DOOH inventory and was established through the use of an OOH audit conducted by Outdoor Auditors, the audit is done twice a year for an update on the market and the verification of the growth of DOOH in the industry (Warburg, 2021). The need for researching new DOOH businesses allows the research to establish whether progressive talent in the workforce is key to understanding the fundamentals of digital disruption and if this helps leverage the entrepreneurial OOH companies against the incumbent OOH companies.

4.4. Unit of Analysis

The level of analysis was traditional and entrepreneurial OOH companies in South Africa that have or are currently transitioning partially or completely into a hybrid business model of selling DOOH inventory. The level encompassed a selection of OOH media companies in South Africa.

The units of analysis were two-fold: top management and lower management within the organisation that have or are playing a role in digital transformation leading to the transition of the firm's business model to a hybrid-based strategy.

4.5. Sample frame/sampling technique/sample size

Because the research strategy was focused on qualitative research, the use of purposeful sampling was best suited as "this type of sampling is essentially to do with the selection of units (which may be people, organizations, documents, departments, and so on), with direct reference to the research questions being asked" (Bell, Bryman, & Harley, 2019, p. 389). This is in contrast to non-probability sampling which is random, the research question establishes who and what needs to be explored – it is strategically positioned (Bell, Bryman, & Harley, 2019, pp. 389-390). The research focus was on change management, the context applies to digital transformation – positioning the research sampling to not only a typical case sampling, but to a stratified purposive sampling allowing for sampling within subgroups of interest such as lower management within an OOH media firm (Bell, Bryman, & Harley, 2019).

Generic purposeful sampling with stratification was utilised in this research report to gain insight and understanding of change management and digital transformation in an OOH company "at different levels of the organization" (Bell, Bryman, & Harley, 2019, p. 394). The research focused on four OOH companies: two that have been in business for over 20 years that have sold both static OOH and DOOH; and two that have mainly only sold DOOH and have been in business for less than 10 years.

This research report sampled from top management personnel and lower management personnel within OOH media firms and experts in the field of transformational strategy of an organisation. The sampling was from the individuals working for the targeted OOH companies, as it was their views and perceptions on the phenomena of change management and digital disruption that was studied. Diverse/Heterogenous sample was important to understand if the change management strategies for digital transformation have been cascaded into the entire organisation especially in the large OOH incumbent organisations (Bogie, 2021). The researcher leveraged off professional networks across the OOH media industry aligned to the research aim.

The OOH media companies across South Africa are diverse and it would create bias to the research aim if less than 2 firms were researched. The aim was to approach 4 OOH companies that are of different scales and offering. The estimated targets were 16, 8 from top management and 8 from lower management; this was excluding experts in the field of transformational strategic leadership capabilities that was excluded out of the data set. (Bogie, 2021).

The sampling frame for this research report is shown in Table 6.

Table 6: Sampling frame for research project

Interviewees by occupation	Number	%
OOH Firm Top Management	**8**	**50%**
CEO OOH Company (traditional)	1	13%
Sales Executive OOH Company (traditional)	1	13%
CEO OOH Company (entrepreneurial)	1	13%
Sales Executive OOH Company (entrepreneurial)	1	13%
CEO OOH Company (traditional)	1	13%
Sales Executive (traditional)	1	13%
CEO OOH Company (entrepreneurial)	1	13%
Sales Executive OOH Company (entrepreneurial)	1	13%
OOH Firm Lower Management	**8**	**50%**
HR Manager OOH Company (traditional)	1	13%
Account Manager OOH Company (traditional)	1	13%
HR Manager OOH Company (entrepreneurial)	1	13%
Account Manager OOH Company (entrepreneurial)	1	13%
HR Manager OOH Company (traditional)	1	13%
Account Manager OOH Company (traditional)	1	13%
HR Manager OOH Company (entrepreneurial)	1	13%
Account Manager OOH Company (entrepreneurial)	1	13%
Digital Transformation Experts (excluded in final data set)	**2***	**0%***
Chief Digital and Innovation Officer	1*	0%*
Chief Digital Officer	1*	0%*
Total	**16**	**100%**

Source: Author's own

4.6. Research/Measurement instrument

The research instruments used in qualitative research derive data "from interviews, participant observation, or documents typically comprise a large corpus of unstructured textual material, and are not straightforward to analyse" (Altman & Tushman, 2017, p. 517).

In order to establish key findings from the research strategy and alignments to empirical theories, it was vital that the data gathering was in-depth and provided detailed facts about the role of strategic leadership capabilities on an incumbent firm. According to Bell et al. the "interview is the most widely [used] method in qualitative research" and is not as structured as

you would have in a structured interview found in quantitative research (Bell, Bryman, & Harley, 2019). This was important for this research project as the organisations that fall under the level of analysis may have contrasting institutional logics or cultures; therefore, it was important for the interview to be flexible to accommodate contradictory identities across the level of analysis. However, because the focus was on change management on the firm from theories already reviewed, a semi-structured interview approach was adopted (Bell, Bryman, & Harley, 2019).

A pilot was conducted to ensure the validity and reliability of the questions posed. The pilot was done on a subject that works within the OOH industry and who is privy to the detail of the status of the market with regards to DOOH and pDOOH.

4.7. Data collection

The data collection methodology was through a virtual meeting software called Microsoft Teams. Preference was for a face-to-face interview, however Covid-19 precautions and time constraints were a factor at the time of interviewing. The interview was conducted in a quiet setting where adequate time was allocated by both the interviewer and the interviewee to ensure robust data collection. The interviewee was contacted to set up the interview and a suitable date and time was agreed upon. The interviewer offered an abstract as to what the interview was about in order to give the interviewee comfort in what was expected of them during the interview.

The interview questions were unstructured or semi-structured also known as qualitative interview (Bell, Bryman, & Harley, 2019, p. 434). The research project was exploratory and it was important to obtain the interviewees "point of view", and allowed for what the "interviewee sees as relevant and important" (Bell, Bryman, & Harley, 2019, p. 435). McCracken argues that "the long interview gives us the opportunity to step into the mind of another person, to see and experience the world as they do themselves" (McCracken, 1988, p. 9) . Because it was semi-structured and flexible, the interviewer was able to also ask questions that do not have answers that were prepared and allowed for probing further to gather key insights about the phenomena. McCracken suggests opening the interview with "grand-tour" questions, "allowing the respondents to tell their own story in their own terms" – ensuring the beginning of the interview was as "unobtrusive" as can be (McCracken, 1988, p. 35). "Floating prompts" given by the interviewer allowed for the respondent to expand on a specific topic if needed and "planned prompts" if needed were used to ensure there was "an opportunity to consider and discuss phenomena that do not come readily to mind or speech" (McCracken, 1988, p. 36).

4.8. Data analysis

For this research project the use of thematic analysis was conducted in order to search for themes within the data because "it is the flexibility of this analytical strategy—the fact that it can be used to analyse a wide variety of types of qualitative data and as part of a narrative, grounded theory, or critical discourse analytic approach" (Bell, Bryman, & Harley, 2019, p. 519). Atlas.ti was used as an analytical tool to do the data analysis. Through the interview process the researcher was able to establish saturation points to reflect repetition in the research and is an iterative process that has five phases which conclude with theoretical categories to establish the results of the research (Bogie, 2021). With establishing themes throughout the data analysis, it was important that the themes that were collected represented and "are relevant to the investigation's research questions or research focus", therefore it was important through the data collection that digital transformation; strategic leadership; change management and OOH or DOOH were represented in the collection of data (Bell, Bryman, & Harley, 2019, p. 519).

4.9. Data quality

In order to establish if the research had quality and rigour, it was important to apply reliability and validity to the research (Bell, Bryman, & Harley, 2019, p. 362). External reliability was possible as other mature incumbent OOH firms are "adopt a similar social role to that adopted by the original researcher" (Bell, Bryman, & Harley, 2019, p. 362). Internal validity could be achieved through credibility of the social reality that has been observed in the mature incumbent OOH firm and external validity questions if the research is transferable, because the strategy of a hybrid business model is a new strategy in the OOH industry with early adoption with only a handful of firms, the research has the ability to be transferable (Bell, Bryman, & Harley, 2019, p. 363).

The credibility of the data quality was established through "ensuring that research is carried out according to the canons of good practice and submitting research findings to the members of the social world who were studied, for confirmation that the investigator has correctly understood that social world", otherwise referred to as "respondent validation" (Bell, Bryman, & Harley, 2019, p. 363). Triangulation refers to "using more than one method or source of data in the study of social phenomena", and allows for "cross-checking of qualitative data" (Bell, Bryman, & Harley, 2019, p. 364). The use of triangulation verification in this research study utilising "multiple data sources" allowed for in-depth understanding of the phenomena from interviewing "people who hold different viewpoints or possess varying amounts of power" to understand how change management has or has not been implemented for digital transformation across an OOH company in South Africa (Natow, 2020, p. 161).

CHAPTER 5: RESULTS/FINDINGS

5.1.   Introduction

This chapter of the research project presents the key findings of the qualitative data collection process against the research questions that have been set out in Chapter 3. The findings from the data collection have been arranged by concepts or theoretical categories that were introduced in Chapter 2 that align to the research questions in Chapter 3.

The total number of interviews that were held were 15 (16 including the pilot interview), with a total duration of 14 hours, and 54 mins (16 hours, and 7 mins including the pilot interview). 15 interviews were transcribed with a total of 245 pages and 121,207 words (269 pages and 133,111 words including the pilot interview).

5.2.   Category analysis groupings of companies and participants

In order to present key findings regarding change management as an enabler for digital transformation within the OOH industry of South Africa, it was important to analyse and consider companies that have different standings within the media ecosystem based on their occupancy in the industry and their media offering. For this purpose, the interviews for the OOH industry participants were split between traditional OOH businesses that have been around for more than 20 years, and then entrepreneurial OOH businesses than have been active for less than 5 years. This is depicted in Table 7.

Table 7: Research participant groupings for OOH businesses

Category	Category-Code
OOH Company (traditional)	T
OOH Company (entrepreneurial)	E

Source: Author's own

The reason behind the comparison of the two different OOH businesses is as a result of the fundamental changes that the OOH industry has experienced over the past 15 years due to digitisation of products and processes and new entrants into the industry. What may have affected the traditional or incumbent firm/business to a large degree might be irrelevant for the entrepreneurial firm and how it conducts business. The digital ecosystem is highly relevant for both sets of businesses and their strategy to be part of the digital ecosystem with the growth of digital media as a threat to the businesses as confirmed in the literature.

In addition to interviewing participants from the different OOH firms/businesses, it has been important to establish a professional opinion or analysis from South African digital

transformation experts on what digital transformation is and how change management can be implemented to enable the digital transformation of people, processes and products.

5.3.   Grouping of Interview participants for context analysis

The data collection consisted of 15 interviews in total out of a planned 18 interviews. The interviews were conducted through Microsoft Teams which is an online conferencing platform. The reason for the online interviews was due to the concern of the Covid-19 pandemic that has continued from 2020, thereby ensuring that social distancing and minimal contact is maintained. All participants were granted confidentiality and consent was given by all the participants. The organisations and the participant identifiers have been removed and replaced with acronyms associated with the type of OOH business and the level of the role or position within the business that the participant holds.

Two of the interviews were completed with digital transformation experts (Pro) in South Africa. Their roles and jobs are either to deliver programs to companies to enable digital change in products and processes or to be involved in digitally transforming a business from start to finish.

The interview participants, a total of 13 interviews that were conducted from the OOH industry were arranged into two primary categories: a traditional or incumbent (T) OOH business and an entrepreneurial (E) OOH business. These primary categories were then split into sub-categories for top management (TTM and ETM) and lower management (TLM and ELM) positioning within the OOH business. Unfortunately, due to the entrepreneurial OOH businesses being newly formed, interviews with ELM were not able to be conducted. This was as a result of limited resources in staff and the fact that the ETM are conducting all roles within the business during the start up or building phase. This is depicted in Table 8.

Table 8: Participant categorisation within company and position/role

Interview Number	Category	Category-Code	Sub-category: Position within Company	Sub-category-Code
1	OOH Company (traditional)	T1	Top Management	T1TM1
2	OOH Company (traditional)	T1	Top Management	T1TM2
3	OOH Company (traditional)	T1	Lower Management	T1LM1
4	OOH Company (traditional)	T1	Lower Management	T1LM2
5	OOH Company (traditional)	T2	Top Management	T2TM1
6	OOH Company (traditional)	T2	Top Management	T2TM2
7	OOH Company (traditional)	T2	Top Management	T2TM3
8	OOH Company (traditional)	T2	Lower Management	T2LM1
9	OOH Company (entrepreneurial)	E1	Top Management	E1TM1
10	OOH Company (entrepreneurial)	E1	Top Management	E1TM2
11	OOH Company (entrepreneurial)	E2	Top Management	E2TM1
12	OOH Company (entrepreneurial)	E2	Top Management	E2TM2
13	OOH Company (entrepreneurial)	E2	Lower Management	E2LM1
14	Digital Transformation Expert	PRO1	Digital Transformation Expert	PRO1
15	Digital Transformation Expert	PRO2	Digital Transformation Expert	PRO2

Source: Author's own

The participants of the interviews will be referenced through their sub-category codes in the remaining sections of Chapter 5. This is to ensure understanding and context when the data is provided through the findings analysis of the research. As an example, when referring to data findings from the second entrepreneurial OOH company from the first lower management position within the company, this participant will be referenced at E2LM1.

5.4.   Saturation analysis

A total 108 first level codes were identified across the 15 interview transcripts collected for the research project. The codes are collated according to the relevant characteristics within categories. These codes were then further reviewed and grouped into a second level category of codes based on the similarity of themes within the research question. The total number of second level codes were 11 group codes or themes which were identified based on the data obtained through the interviews with the participants. These group codes have then been further categorised to represent the themes that have been identified in the data captured. The process followed here this is a thematic analysis as it assisted in finding themes within the data by establishing patterns.

The saturation of the codes across the T OOH categories of the participants was high with the code category of "digitisation and digitalisation of business" being highly saturated. For the E OOH categories of the participants, "Business Strategy" was highly saturated. The Digital Transformation Experts/Professionals had high saturation in "Digital Transformation Enabler". Figure 4 represents the (T) category; Figure 5 represents the (E) category and Figure 6

represents the (Pro) category of saturation. Figure 7 represents saturation matrix of all 3 categories. Figure 8 represents total codes of all 3 categories.

Figure 4: Traditional OOH business code saturation matrix

Traditional OOH Busines Code Saturation

Figure 5: Entrepreneurial OOH business code saturation matrix

Entrepreneurial OOH Business Code Saturation

Figure 6: Digital transformation expert/professional code saturation matrix

Digital Transformation Expert/Professional Code Saturation
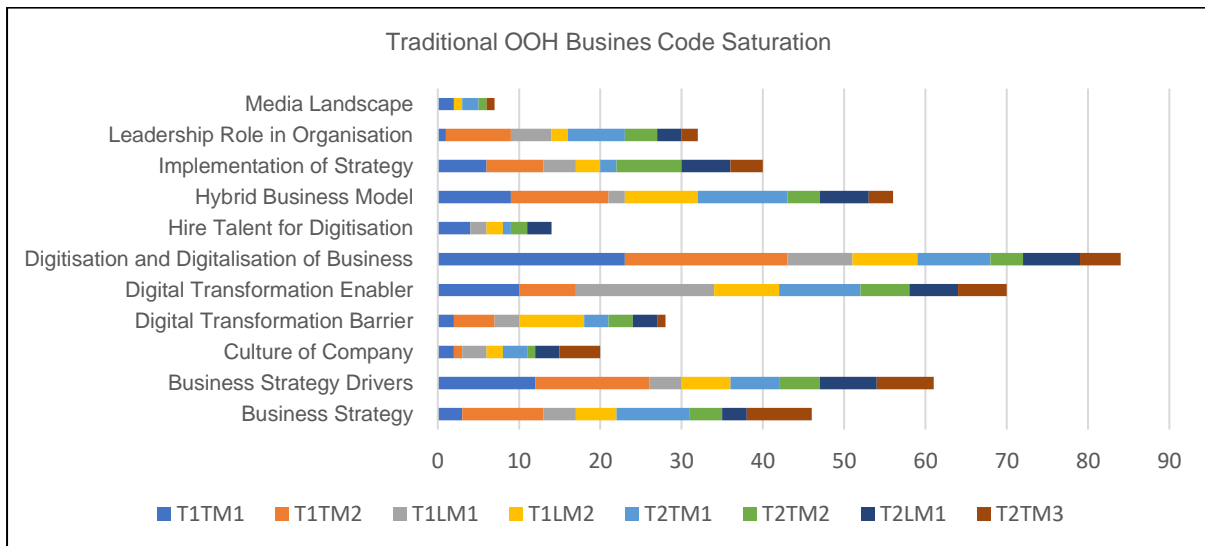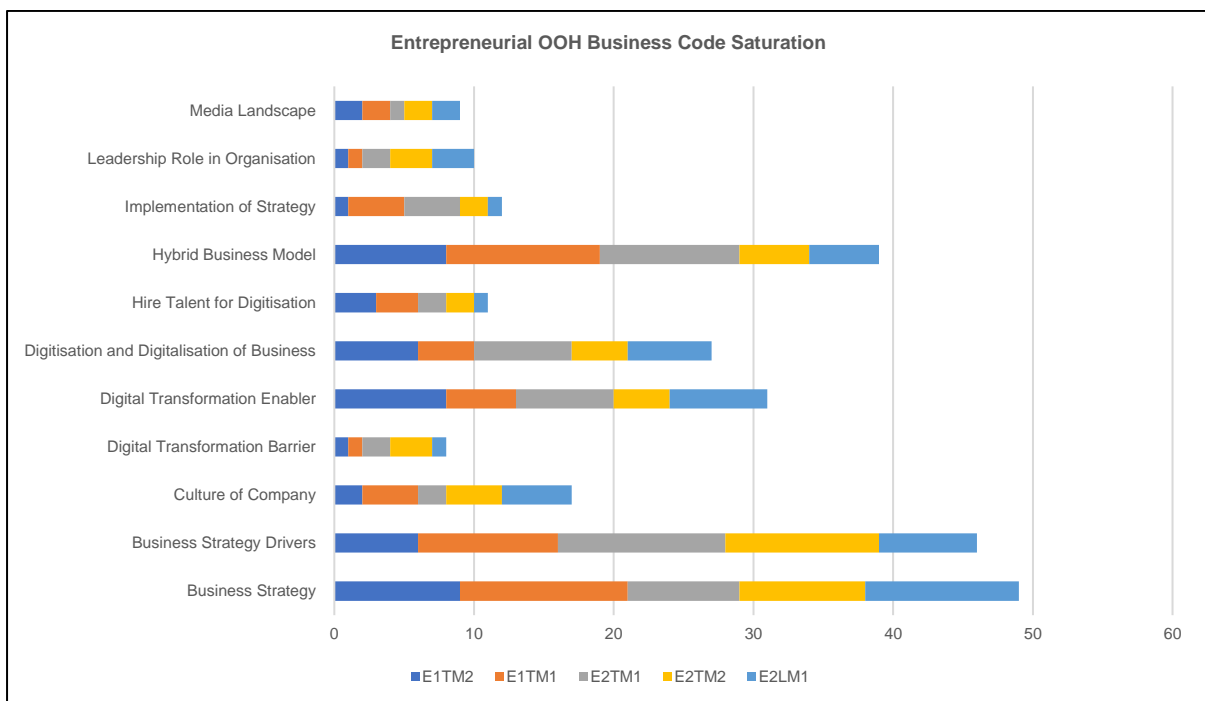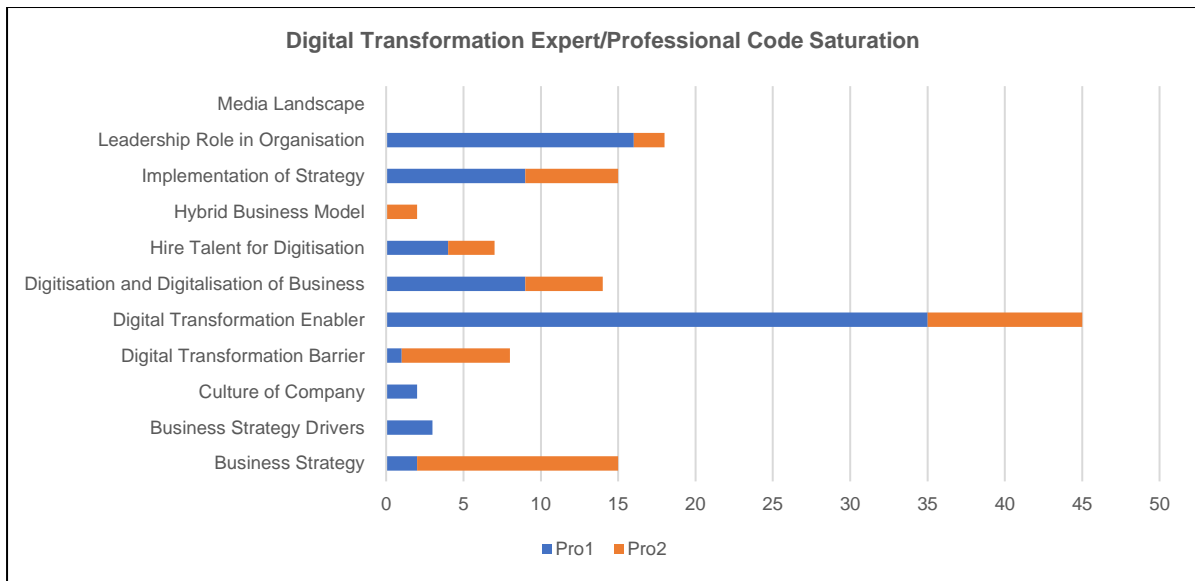
Source: Author's own

Figure 7: Saturation matrix of all 3 categories
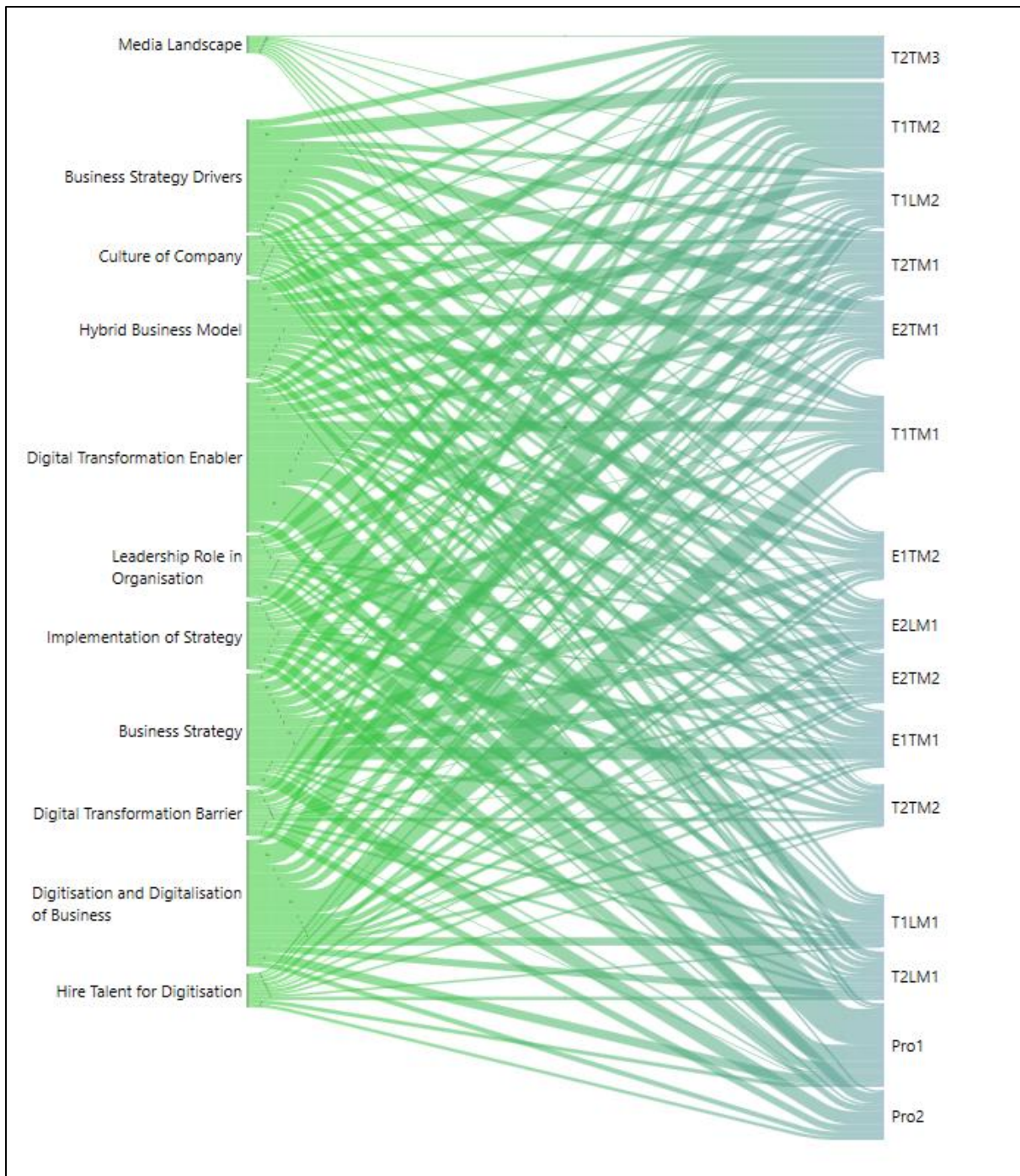
Source: ATLAS.ti

Figure 8: Total codes of all 3 categories

Figure 8: Total codes of all 3 categories — Total Codes from All Categories. Bar chart with categories T1TM1, T1TM2, T1LM1, T1LM2, T2TM1, T2TM2, T2LM1, T2TM3, E1TM2, E1TM1, E2TM1, E2TM2, E2LM1, Pro1, Pro2.
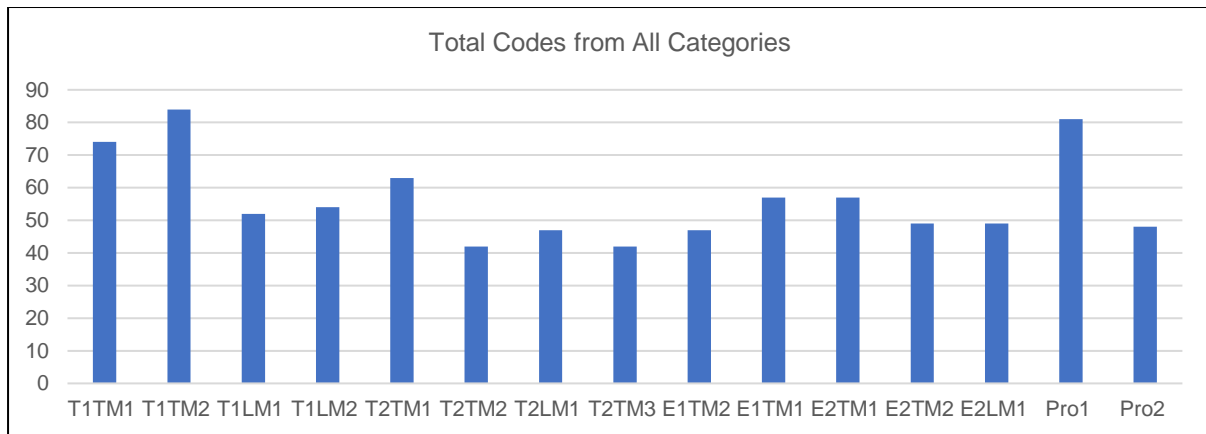
Source: ATLAS.ti

Participant representation is summarised in the following tables: Table 9; Table 10 and Table 11.

Table 9: Participant categorisation contribution to the research project

Category	% contribution to the study
Traditional OOH	53%
Entrepreneurial OOH	33%
Expert/Professional	13%

Source: Author's own

Table 10: Participant tenure in the media and OOH industry

Interview Number	Category	Sub-category: Position within Company	Tenure in Media Industry	Tenure in OOH Industry
1	OOH Company (traditional)	Top Management	20 Years	20 Years
2	OOH Company (traditional)	Top Management	25 Years	25 Years
3	OOH Company (traditional)	Lower Management	11 Years	11 Years
4	OOH Company (traditional)	Lower Management	17 Years	17 Years
5	OOH Company (traditional)	Top Management	22 Years	22 Years
6	OOH Company (traditional)	Top Management	25 Years	3 Years
7	OOH Company (traditional)	Lower Management	20 Years	6 Years
8	OOH Company (traditional)	Top Management	30 Years	4 Years
9	OOH Company (entrepreneurial)	Top Management	14 Years	12 Years
10	OOH Company (entrepreneurial)	Top Management	4 Years	9 Months
11	OOH Company (entrepreneurial)	Top Management	14 Years	14 Years
12	OOH Company (entrepreneurial)	Top Management	15 Years	11 Years
13	OOH Company (entrepreneurial)	Lower Management	9 Years	6 Years
14	Digital Transformation Expert	Digital Transformation Expert	N/A	N/A
15	Digital Transformation Expert	Digital Transformation Expert	N/A	N/A

Table 11: Participant gender split

Category	Female %	Male %
Traditional OOH	25%	75%
Entrepreneurial OOH	0%	100%
Expert/Professional	0%	100%

5.5.   Presentation and analysis of the interview findings

Through the data capturing of the research process for this project, the data findings for the interviews are presented and discussed according to the theoretical categories and themes that were presented in Chapter 2 of the research project. An inductive coding and grouping of data was recorded with the aim of describing a phenomenon. This was also done to build on the theory of strategic management capabilities being limited on how a South African OOH business can successfully implement change management capabilities through digital transformation to ensure success of a hybrid business model. The research is exploratory in nature. The application of pre-conceived categories or codes was avoided as much as possible in the interview questions for the participants in APPENDIX 3. Insights from the interviews have emerged which allow for in-depth analysis of the participants contribution to the research study.

The findings for the interviews and the data captured are presented and discussed according to the themes that emerged during the interview process through thematic analysis which through interpretation supports the narrative of the research question presented in Chapter 3. The findings have been mapped against the three categories: T; E and Pro.

Figure 9 presents the structure that will follow for the remaining sections of Chapter 5 of the research project of the key findings from the data collection and analysis process.

Figure 9: Structure of research themes from findings
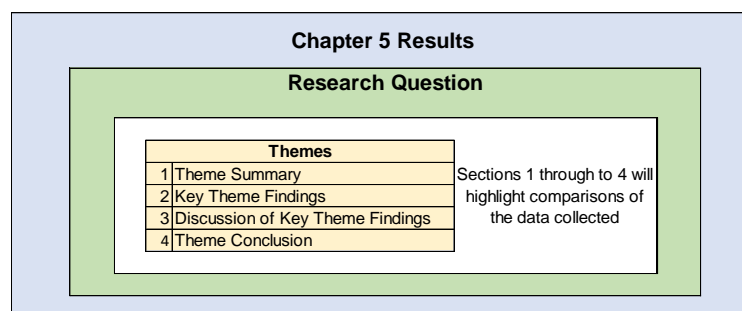
Each theme will be presented on its own. The research question was developed from theoretical constructs which allowed for the processing of various questions that allowed for descriptive coding; interpretive coding and finally led into overarching themes. Each theme will be presented as follows in Figure 10.

Figure 10: Coding and overarching themes result layout
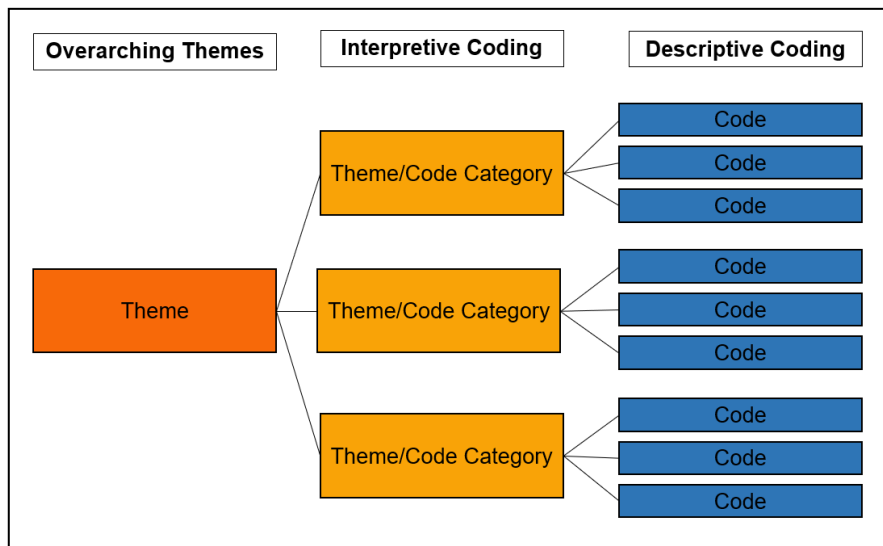
Source: Author's own

5.6. Results

5.6.1. Results – Findings for Research Question 1

How are OOH companies approaching digital transformation?

This question which was first presented in Chapter 3 investigates at the OOH organisations and the way in which they conduct business strategy and approach digital transformation within the company as well as on an external level with the environment with which they conduct business. Table 12 below shows an overview of the results for this research question which are discussed later in more detail.

Table 12: Drivers of Digital Transformation in OOH
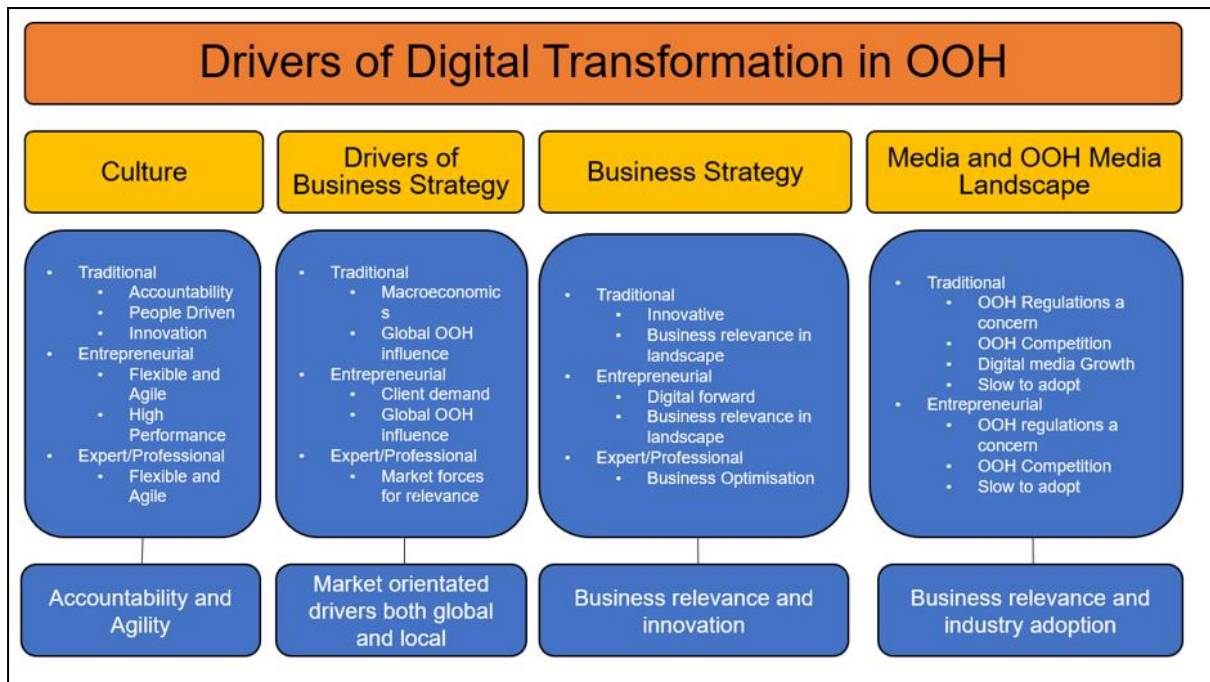
Source: Author's own

5.6.1.1.   Research Question 1 – Theme 1: Culture

5.6.1.1.1. Theme summary for culture

Culture was a key factor that transpired when interviewing the OOH businesses of both traditional and entrepreneurial companies as an important factor for driving digital transformation. The experts/professionals did not note culture as an important factor for driving digital transformation. The use of the Harvey's ball method within the matrix below - labelled Table 13 - allows one to understand that culture is driving digital transformation within the two different categories; however, the experts are divided. The differences and similarities are then described in further detail within the key findings of the theme.

Table 13: Culture as an important factor of driving digital transformation

5.6.1.1.2. Key theme findings for culture

After establishing the role in which the participants play within the organisation that they work for, it was key to establish how long they have been in the OOH industry and their total years within the media industry to validate their knowledge of the changes and dynamics that have been paramount within the media industry, most importantly the OOH industry. Here the researcher has set the scene in terms of experience vs culture, whereby it is evident that the T1 and T2 businesses have TM that have been in the industry for over 20 years in comparison to the E1 and E2 businesses that have been in the industry for under 10 years.

The T businesses have culture as a solid foundation within the organisations, and it is part of their business strategy. T2 is currently establishing a more structural approach to their culture ensuring it runs throughout the different divisions but they believe that culture is important for success most importantly innovation and high-performance.

As stated by T2TM1:

> *It has always been part of our DNA.*

> *If you have survived our culture, that's a big thing because we've got a high-performance culture.*

T2TM2 reported that:

> *(Innovation) I think it's probably the backbone on which you are competitive within the category.*

T1 was able to identify key points about their culture as a strategy that they follow. T1 have a set of values which they live by that drive the organisation's business strategy. These are built on five pillars, with accountability; high performance and people first focus being key features of the culture of the business.

Participant T1TM1 reported:

> *So, the culture really is, suppose one of responsibility for getting things done. One that we try and do properly, first time around. So, there's a sort of an element of urgency. And there's a thing of just doing it right the first time. A culture of accountability. So that people take ownership of the work that they do.*

> *Treating people fairly and giving merit where merit is due. And generally, we try and make this known to be a nice place to work.*

Participant T1TM2 reported that:

I think we definitely have a family mentality. And I think that's one of the biggest differentiators and I think that permeates from the top down.

Participants T1LM1 and T1LM2 validate what T1TM1 and T1TM2 state by acknowledging that that company has a culture of people first, and the responsibility of the individual is key.

Participant T1LM1 reported:

You work hard, you can play hard, and you can play as hard as you like, as long as you've worked hard.

Participant T1LM2 reported:

Very family orientated, especially now with Covid-19 – you have freedom to a certain degree, as long as you know your job is done.

When interviewing the E1 and E2 organisations, it was made clear that culture is not something they follow like a checklist or thing to do. Both organisations have small teams in comparison to the T1 and T2 organisations, where the leaders of E1 and E2 are heavily involved in sales and business development on a daily basis at an operational and implementation level. The E organisations refer to leaders and employee's culture, and the way they operate on a daily basis, which as a result has become the culture of the organisations. Both organisations are driven by agility and high performance or accountability which has been extended(?) from their leaders.

Participant E2TM2 reported:

Happiness is important, and whatever you do, make sure you do it properly. Service must be the best you can.

Participant E2TM1 reported:

The company's culture I'd like to think from an automation perspective is very much centred around being sales oriented.

Participant E1TM1 reported:

So, we're, it's a, it's one that we're trying to develop, because when, you know, culture, kind of brand identity is one that we still developing. But for us, if I can talk about business culture, it is one where we are focused on flexibility and speed to markets and, you know, being able to adapt very, and respond very, very quickly to changes around us.

When discussing culture with Pro1 and Pro2, it became apparent that culture is not the driving force of change but that change comes from the leadership. However, for a company to be successful with change they must always have the ability to be agile and flexible to the surrounding market forces.

Pro1 reported that:

Culture is not a motivator for change, it comes from strategy and vision.

5.6.1.1.3. Discussion of the key theme culture

Culture has been identified by both T organisations as the driving force of their business as well as the element that sets them apart from the rest. Based on the findings, it is evident that both organisations pursue a culture of high performance and accountability which has been established over a number of years as an incumbent firm. A culture of innovation is a priority to the T organisations as they have been active for over 20 years and they have seen and felt, first-hand, the drastic changes which have occurred in the media landscape since the inception of digital media. Agility is important but the change is slower within a larger incumbent organisation as there are more assets and liabilities about which to be cognisant.

A differentiator between the two organisations is that T1 is people-centric and family orientated, whereas for T2 this was not a key positioning that transpired through the interview process. In light of this, it was made clear by T2 to the researcher that T2 is restructuring their approach to culture and have created a new plan and programme to facilitate through the company - one that is more people focused.

The E organisations are focused on market demand, ensuring they have agility and flexibility in their offerings to the market. They are sales orientated and high performance driven towards achieving their targets. The participants that were interviewed all had the intrinsic belief that delivery and performance are key. However, they spoke of their leaders and colleagues as family. The organisation itself was not referred to as being family orientated – but more that every person within the organisation is seen as a support structure.

A similarity that was established through the data collection was that there are no barriers within both T and E organisations in terms of expression and assistance. Everyone has an open-door policy for discussions on merit or of concern.

The findings from the experts/professionals have identified for the researcher that change management or change does not come from culture, it comes from the fact that the implementation of strategy as culture is not a motivation for change.

5.6.1.1.4. Conclusion of the key theme culture

The T and E organisations have verified that culture is a key factor for the business, with the similarity of accountability and agility being positioned within both types of organisations. However, the difference is that the T organisations have a structured approach to culture and the E organisations do not. The ability to change with market forces is not a simple process for a large incumbent firm.

With the E organisations being newly formed and having recently entered the OOH industry, it is more focused on performance and on meeting the demands of the market. With smaller teams and inventory to manage within the E organisations, the culture of agility is highly established within the organisations.

5.6.1.2. Research Question 1 – Theme 2: Drivers of Business Strategy

5.6.1.2.1. Theme Summary for Drivers of Business Strategy

Drivers of business strategy are very important for the future of the OOH organisations due to their ensuring longevity of the businesses. South African OOH businesses seem to replicate what is being done on a global market level and they are usually just behind the curve.

The Covid-19 crisis was reported to be an important factor within the T and E organisations, this relates back to the ability to be agile within the business and its offerings. The T organisations, with their legacy of static/traditional holdings were more affected by the

lockdown levels than the E organisations. This is because the E organisations have the majority of the digital holdings allowing for agility and pivots across the majority of their revenue generators. The E organisations are susceptible to client demands within the industry thereby being reactive, where the T organisations have a long-term focus to be proactive.

The experts/professionals both indicated that businesses must be aligned to the market forces and constantly scope the environment for changes to ensure business relevance and customer experience.

Table 14: Digital Transformation as a driver of business strategy

THEME	Traditional OOH	Entrepreneurial OOH	Expert/Professional	Collective Feedback
Digital Transformation as a driver of business strategy	⚫	⚫	⚫	⚫

Legend:

⚫ Market related drivers of strategy for digital transformation

Source: Author's own

5.6.1.2.2. Key theme findings for drivers of business strategy

The T organisations have a structured approach to their business strategy and the business revolves around their strategy. As start-ups, The E organisations had a strategy when starting the business and remained focused on ensuring business success through the early stages of business development.

The T organisations have reflected on Covid-19 being paramount as a driver of their strategy due to the changes that had to be made in order to remain relevant and ensure business productivity in a changing world. As South Africa was placed under lockdown a few months after Europe and America, the local T businesses were able to learn from global counterparts. The T organisations always tend to look to the global OOH industry to drive strategy, whether Covid-19 was the trigger or not. Macroeconomics of South Africa is a factor that was mentioned as a driving force due to market orientated issues such as: advertisers budget cuts due to consumers lowering their spending and on a microeconomic level, advertisers moving to digital media instead of traditional media.

Participant T1TM1 reported:

> *So, for example, we'll learn from the World Out-of-home Organisation (WOO), OAAA in America, and really just to see what's happening there. Because generally speaking, what happens in the UK, Europe, America, they're generally a few years ahead on what's happening in South Africa, so we sort of lean on that and see where the trends are going and see what's best to be implemented in our local market.*

Participant T1TM2 reported:

> *Also, we are very fortunate, we get to go to WOO and obviously, you've got a lot of international businesses showcasing what they have been doing, and how are they driving it, and a lot of innovation from a digital perspective, not necessarily from the actual tech from putting it in the ground. I mean, some of that we did ourselves. So, you know, obviously, we were fortunate we had conversations with some of the key digital players in the UK when we were embarking on some innovation, which sort of led us in a certain direction, which I think was good.*

> *So, we come back from WOO, and we, and we have quite in-depth discussions around, you know, do we think that a lot of the stuff we've learned today will be applicable? And what can we do with it? And will it work in South Africa. And that's sort of like a starting point.*

T1LM1 reported that:

I hate to harp on about Covid, but it's a reality. And I think that our current strategy has taken, I wouldn't say a backseat, but if I compare maybe what the strategy was two years ago versus what it is now. Goals are lower, we aren't aiming to shoot the lights out again, we're aiming to survive.

T1LM2 reported that:

There was a lot of the stuff that we wanted to do, we've had to put on the back burner because of costs, especially with the lockdowns and with Covid-19 and the economic climate, but generally is I can definitely say like strategy for the cost saving measure is definitely working.

T2 agrees with the sentiment from T1 that their business strategy is informed by global influence, and they are aware of the limitations within the South African landscape or environment. T2 also makes mention of the advertiser element with regards to spend patterns on OOH. Covid-19 was also a factor that was brought up as a driver.

T2LM1 reported:

So, in terms, we use a lot of research from overseas to pinpoint where we need to go, in terms of out-of-home with out-of-home trends are going and obviously if spend for out-of-home overseas is down, our multinationals aren't spending with us either.

In addition, T2TM1 mentions that:

And you have to localise a lot of those things. Yeah. Because, you know, this is not America or Germany, or, you know, so there's a local localization element in it. But I think that's where our skill comes in. And that's worked well for us.

T2TM2 reported:

And I think we're lucky, and lucky for Africa or South Africa, and we see what's going on globally, we're able to adapt.

T2TM3 reported:

Covid-19, we had the positive side of it, we would be lagging behind the rest of the world so we could almost see for example what's happening in the East you know, Europe, North America and then in Africa so it was a lot easier for us to make certain business decisions and strategic changes because of what's happening on a macro level so yes.

T2LM1 reported that:

> *And with COVID I think you need to try and digitise as much as possible, our business is quite digitised, which is quite nice.*

A similarity that was raised for T2 and E1 was the need for deep discussions with the clients or advertisers.

T2TM1 reported that:

> *We're also having a lot of deep discussions with some of our media agency partners that are quite active in pDOOH.*

E1TM1 reported that:

> *If you can understand the objective of the client, and your ultimate goal is to give the client what they need. And those things don't become much less of an issue. Because our intention is to give the client what they need for the objectives that they want to achieve.*

For the E businesses, global OOH influence has been important for a driver of business strategy as an informing solution because of the limitations within the South African landscape.

E1TM2 reported that:

> *Definitely, I think if you want to be a forward-thinking business, and forward-thinking and innovative, I think we've got to look at what's happening globally, and see how that's applicable here. We, I'm sure you and I can both agree that this is a different beast in conjunction with other markets. But in the same breath, you've got to see what's happening there. And it definitely does affect or impact what we do today in order for us to be sustainable, whether it's b2b locally or globally.*

E2TM1 reported that:

> *And part of that two-year process was obviously in the first place we started looking at what's being done overseas.*

> *So, we've tried to look at some global best practices. But to be honest, everything that we've done has been… we've kind of done it ourselves, kind of locally.*

E2LM1 reported that:

> *I think we've definitely followed like trends in the sense of global trends and also South African trends and, and kind of, you know, stepped aggressively into the digital space, the roadside digital space.*

Covid-19 was also a factor that was mentioned, but because the E organisations inventory are mainly digital, they were quick to react, however the concern is on advertisers cutting budget.

E2TM1 reported that:

> *And I think, if anything, COVID has probably split up the market dramatically. So, I think we've been fortunate that we didn't start out in static.*

E2LM1 reported that:

> *You know, and I think after Covid-19, and what's happened, and guys are like really cutting back on marketing budgets, it's going to be a while until you sort of see those big, big brand budgets that can accommodate like, huge, you know, ambient executions or really expensive sort of production executions.*

The E businesses, although very entrepreneurial and digital focused, look to the incumbent and market leaders for direction on what to do next. They seem to take on a second-mover advantage strategy second to their primary strategies in place with regards to being different from the rest.

E1TM1 reported that:

> *The big players in the market, they drive that to a large degree. So, whatever the big players are doing, ultimately, is going to feed down to the rest of the industry.*

E2TM1 reported that:

> *Yeah. It's, we're not going to be like everybody else. We're going to do things differently from the quality of the stuff that we put up to what it looks like to how we do it. And I think it's, I think, the first step and then to look at what we've done. But I think we're quite proud of what we've done and to differentiate, differentiate ourselves.*

E2TM2 reported that:

> *On the innovation side, I think OOH has innovated the last year due to Covid-19 with programmatic digital. So, I wouldn't say we at the forefront, but there are also four or five other companies. So, we just have to make sure we were there.*

Pro2 believes that drivers of business strategy come from the market to ensure that the business stays relevant or reimagine itself, and that the customer experience is a big factor of success. An important factor mentioned by Pro2.

Pro2 reported that:

And my view is that digital is a business imperative. It's about reimagining an organisation for it to remain resilient and relevant in this new digital economy. That means flexibility around business model flexibility. And they have to address one of three dividends: growth, productivity, and customer experience, right?

Pro1 has made it clear that the business itself needs to understand what it wants to achieve.

Pro1 reported that:

Drivers of business strategy is actually quite simple. What is the opportunity at hand? Do you want to grow or expand or build a new business? What is the required capability to make, survive and grow your business on a practical level?

5.6.1.2.3. Discussion of the key theme for drivers of business strategy

Across all three categories interviewed, the market is a key factor that drives business strategy for the OOH organisations. They all lean heavily on global influence for what to do next or what they should be doing. The focus is very product and process based in terms of what they have to offer the market. T1 has established that they are known for first mover advantage in the market; T2 likes to ensure everything is in place and accurate before bringing new commodities to the market. Both E companies are building on their initial business strategy of differentiation but they will follow the market leaders.

Covid-19 affected both T and E companies, from the capability of being ready to pivot, to be agile and flexible to clients demands, and also regarding the onslaught of marketing budget cuts from advertisers during the hard lockdown levels. Ultimately their business strategies were forced to change because of Covid-19 and no one was prepared. The E organisations felt the pain a lot less due to smaller OOH holdings with less liabilities and with 90% of their holdings being digital in comparison to T organisations who have large holdings and the majority of their holdings are static/traditional.

The comparison to global initiative capabilities and what is able to be done in South Africa is important across the T organisations. The E organisations also looked to global trends when they started their businesses, but they are conscious of the local market to a higher degree. Both T and E are client driven; however, this is based more on processes for E not so much on the product front - as has been identified with T. As E organisations are new to the industry - with products that are already in high demand – they ensure that they are doing the best with what they currently have while still looking at the market for new developments for growth and diversity.

The experts/professionals added a clarifying layer to business drivers of an organisation which indicates that organisations need to look inward for what they desire in business growth. The external environment will send triggers for opportunities but optimisation needs to be carefully assessed within the organisation's landscape. Pro1 stated that ultimately an organisation must decide between "decomposing; redesigning or designing" for future resilience and relevance.

5.6.1.2.4. Conclusion of the key theme drivers of business strategy

The drivers of the business strategies for the OOH organisations have focused primarily on digitisation of products and the capability of what the products are able to do in relation to market forces and initial strategies. All four organisations commented on a digital strategy that has been driven by various factors as highlighted above. The need to be agile in the face of adversity - as learnt from Covid-19 - has made the T organisations rethink their current strategies so as to be nimbler and more adaptive to external forces. For the E organisations, it was about ensuring that their original strategy was, in fact, exactly where they wanted to be as well as working with the advantage of learning from the industry on new ideas or innovations.

The expert/professional dimensions of forces of business strategy related to relevance and resilience across the organisation as a whole, not just to the products offered or the processes in place. This highlights the capability of the organisation to adapt to market forces for drivers of business strategy from within the organisation and to prepare the employees to be agile and flexible for change. The element of people is introduced by the expert/professional for the first time here with regards to digital transformation for business strategy.

5.6.1.3. Research Question 1 – Theme 3: Business Strategy

5.6.1.3.1. Theme Summary for Business Strategy

Business strategy is the driving force for the T organisations in this study. They are very well planned and structured through consultation of the executive team and leaders of the organisation. They are long-term with reviews occurring less than desired. T2 is currently transforming their strategy based on repositioning the organisation in the market and have made changes to their legacy business strategy.

The E organisations who have been in the market for less than five years are currently solidifying their initial business strategy ensuring that they remain focused to the goals set up from the start-up but remaining relevant by ensuring they are digitally focused.

The expert/professional category within this theme have given the researcher a sense of what a business needs to strive for in the digital economy, because they are not associated with an OOH organisation this feedback is generic.

Table 15: Digital Transformation is in Business Strategy

THEME	Traditional OOH	Entrepreneurial OOH	Expert/Professional	Collective Feedback
Digital Transformation in business strategy	⚫	◑	⚫	⚫

Legend:

⚫ Digital transformation is in business strategy

◑ Digital transformation is not main focus of business strategy

Source: Author's own

5.6.1.3.2. Key theme findings for business strategy

Innovation through digital transformation is a key factor for both T and E organisations. However, the T organisations are shown to be the driving force of new products or processes – where the E organisations entered the market as a differentiator in terms of product and service offering to compete with the T organisations. Due to the nature of DOOH and the capabilities that exist within the product, there are opportunities presented for innovation.

T1TM2 reported that:

> *That's just the nature of our industry, you know, so we're not we're not like a TV station, or radio station where you've got infrastructure and infrastructures there. And it's how you use the infrastructure. We are continually putting in new infrastructure, so we have a huge opportunity to innovate at that level.*

T1LM2 reported that:

> *I'm 99% sure that it is because that's basically what we do every day, is we trying to find better ways of using our systems and processes, as well as our innovations team that gets together to make sure that everything works, and put the best ideas out there. For us to be able to transform, digital transformation has got to be in everyone's strategy, not just ours, but it is definitely part of ours.*

T1LM1 clarifies that T1 is actively putting new products into the market, and reported that:

There's always a new email coming out about this is and that and what the company is doing. This is a new project. And I was absolutely blown away.

T2 is an organisation that is built on innovation in order to remain relevant and compete, as T2TM3 states:

So, the company like ourselves, it's built on innovation. You know, you need to be, you know, quite aggressive, you know, in your market and your, your growth in everything that you want to do.

T2TM2 reported that:

So, it is important, but I, I suspect it's going to become increasingly important as we think about our brand, what it does, because what's happened is we've got lots of different businesses, we're thinking about these different strategies.

The E organisations see innovation as part of what they do and is how they differentiated themselves from the competition to begin with, but the main focus is a digital forward strategy that was set up from inception of the business.

E2TM2 reported that:

So, we definitely have set ourselves apart. And again, thankfully, it's helped us. And we could survive and get through last year.

So, we said, we're going to be different. And again, as you see in any industry, not just OOH, if you're different. You can stand out. So that was our kind of our clear goal.

E1TM1 has indicated that they do not want to pursue anything gimmicky but will only pursue things that will drive growth for the business:

A lot of the awards in the industry are very gimmicky. And it costs you know. So, clients are wanting you to do them, brand managers are wanting you to do them. Agencies are wanting it, but they're very difficult.

And that comes to it doesn't make practical sense for us, as a financial gain. And as a small business, if we allocating resources to something that doesn't make us money, that hurts us because we don't have additional resources. If you've got 200 staff, you can play that game, but also on a top level is, is it adding value to our client's business? And isn't it not just driving the short-term activation side of things? But how are we playing a role in growing their business over time, because our intention is to be, you know, here for a long time, so trying to balance the things over time.

The E organisations are based on being a differentiator to the market and are careful with new ideas and innovations that are put into the market, they will monitor the incumbent organisations and see what they do before embarking on anything new. They are comfortable being at second mover advantage is where they are comfortable at being while their businesses are growing. This was also a key finding for T2, who prefer to ensure that the offering is 100% right before going to the market. T1 has indicated that they are a first mover in the market. Their success in this is that they are able to fail fast and move on if the project is not a success.

T2TM1 reported that:

> So, what we've done is we've taken a cautious view to it, we've started to apply, but we want to do it the right way. And we talking to a lot of people. A lot of other organisations, now we also looking at best practice. So, we all when we launch, we'll do it properly.

T2TM3 reported that:

> It's not always the best to be first. It's not always the best to you know, when it comes to innovation to be that unique one. Sometimes you just take something else and you perfect it and I think companies sometimes are so fixated to be the next Apple.

E2TM1 reported that:

> We are still a small team. Did we do what we need to, we probably do need to start in the next couple months. But we've always said, we're not going to rush into things.

> But we probably got quite a quite a way to go. Still, I mean, there is amazing stuff out there that can be done. And we're not doing it? Because it's a combination of things. The clients are not pushing for it. But we also probably not driving in line with the clients. So, we probably need to do a bit of work on it.

E1TM1 reported that:

> But yeah, it's, it's taking those nuggets not allowing it to, to hamper. So, I think if you if you can look at this, what you can as a small business, you can very quickly, you know, go, wow, this is a big mountain to climb if you want to compete in that space, but it's to look at it and pick out what, what each one (competitor) is doing well, what can we as individuals within that business practically take on?

In terms of T1 stating first to market initiatives being key, they are also aware that if it doesn't work then they must move on.

T1TM1 reported that:

And as I said, some of those plans are also in infancy and the products are in infancy, the media buyers don't really know how they work yet. But that will take some time, but at least we are in play and we got it, it works. And also, the thing is that our competitors may have to try and catch up in that space. But while they catch, we may be looking for the next thing that's coming and keeping that in your head. And so yeah, I'm confident that the strategies that we have in place on the right ones for the digital expansion and transformation.

T1TM2 reported that:

We go where break away, we come up with an idea. And everybody gets onto that, yeah, and then we go back and we start working on it, and we realise, well, that sucks.

So it's not that's not the problem, it's just that, you know, the market might not be ready for it or for whatever reason, you know, it's, it's maybe just a little bit too out there, you know, or maybe clients don't get it. But it's, it's fine, then we move on, we don't flog the dead horse, we don't keep going at it.

T1LM2 reported that:

The one thing that you need to also do when you work in an environment and the culture like this, you've also got to be very agile and quick enough to pull away if something does not work. So, you mustn't be cut short trying to implement to put in the effort even if it's good and honest but if it doesn't work, let it go.

In terms of business relevance for the future strategy is key for both OOH categories and it is the reason why they have a strategy in the first place.

E1TM2 reported that:

I think without going too deep into our personal culture, and we all are highly competitive people. And in order to remain competitive, you've got to stay current.

E2TM2 reported that:

And again, having to think, key sites in key areas where there's demand, so again, when in inventory winning locations, putting up sites that are approved and relevant, I think that's its relevancy, because I think is going to be so much noise and clutter and I think that also Covid was good, took down a lot of large format stuff, and cleaned it out a bit.

If we didn't develop digital out of home, I think we would be in trouble I honestly think we'd be in trouble. … I think thank goodness for the digital era and if that didn't come along I think I really would have would have been struggling at this point in time and again I think COVID expedited that maybe even 1000 fold which I think if you, if we didn't if we if we were to rebuild and didn't have digital assets then we would have been a totally different business, but we were just doing our strategy aligned to see what happened so I think trying to answer your question I think digital home has kept out of home relevant.

I think it's you need to be as knowledgeable as possible, making yourself relevant. It has changed, the people we deal with have changed.

T2TM1 reported:

But, but it's critical, I think, especially in the environment, we live in the world we live in, if you're not constantly reinventing and creating change and driving the change, somebody else will. And that's part of our DNA. So, and that will remain part of our DNA.

The experts/professionals have a very clear stance on business strategy for digital transformation. And they are in agreement in terms of the "why", businesses need to ask why they want to change.

Pro2 reported that:

Digital transformation is not about the technology, it's about defining the business ambition that you have for the business in this digital economy. And my view is that digital is a business imperative. It's about reimagining an organisation for it to remain resilient and relevant in this new digital economy.

And to focus on the three dividends of revenue growth. In other words, can I generate new products and services to create new growth? Can I use digital thinking to reduce the cost of doing business, in other words, make myself more efficient, improve quality, remove defects, and then have the customer experience - so I took away the core factor out of digital and made it more about business and networks, right?

Pro1 reported that:

How do I optimise a business design that will actually carry all the weight of the organisation, which is basically your experience or service delivery, basically, delivering what the business is supposed to do?

5.6.1.3.3. Discussion of the key theme of business strategy

The OOH organisations have similarities with their business strategies with regards to remaining relevant in the digital economy that has taken over the media landscape in the past decade. For the E OOH organisations, the difference is that they began their businesses with DOOH and have a minority amount of traditional inventory. With that being said the E organisations are confident in their initial business strategy of being digital first.

For the T organisations they are focused on innovating to move forward with the digital economy, by creating OOH products that are more digitised or linked to digital media. They are also aware of the need to increase their current DOOH inventory, however to be done strategically – not just for the sake of building a new billboard. The E organisations are focused on growth of their business from where they started and will look to the incumbent firms for innovative ideas before they embark on a risk of spending money that will not deliver on the bottom line. As newly formed businesses that have made their mark in the industry it is important for them to ensure that they continue to deliver on their initial promises to their clients. As mentioned in the drivers of business strategy, they are very focused on high performance and delivery – very sales orientated.

Relevance and resilience and redesign as reported by the experts/professionals is key for survival in the digital economy. The OOH organisations are aware of the threat of digital media and are looking at opportunities to ensure longevity of the business or decide on spin-offs from the core when positioning into the digital economy. The "why" is there for the businesses to decide on strategies going forward but it is imperative that they look at the business as a whole, not just the products and processes for digitisation.

5.6.1.3.4. Conclusion of the key theme of business strategy

Digitisation as established above in the key findings is important within the digital economy across all 3 categories. The older incumbent firms are looking for innovation to remain relevant and resilient, with new DOOH to also steer this growth they believe that innovation is key to success in the digital economy. The E organisations are built on a digital first strategy, where they are comfortable and believe they have positioned themselves well for the digital economy. With some innovations added to the E organisations during their start-up phases, this is something that they actually rely on the incumbents to push and then the E organisations will look to how this drives the bottom line for the business. The experts/professionals have added great value to this theme by indicating what an organisation needs to look to for ensuring relevance and resilience into the digital economy through optimisation of the current business to be positioned successfully.

5.6.1.4. Research Question 1 – Theme 4: OOH media landscape

5.6.1.4.1. Theme Summary for the Media and OOH media landscape

The OOH landscape in South Africa is part of the media landscape in South Africa. Historically before digital media, OOH had to share advertiser's media spend between other traditional media: TV; Print and Radio. Since the onset of digital media most importantly social media, OOH has had to compete even harder for a share of the spend with digital taking up to 60% in some instances in South Africa.

T1TM1 reported:

> *And the so it's been quite a long journey. In terms of watching this big digital monster, getting a bigger, bigger increasing market share and the market into an advertising spin.*

The researcher has shown above how digital inventory and innovation has positioned OOH into the digital economy, but the OOH organisations are faced with other factors that shape their digital transformation strategy. These will be explored in this theme, OOH media landscape. Because the experts/professionals are not integrated into the OOH media landscape they are omitted from this theme, however they indicated that the local market would be a driver of business strategy and must be considered highly. Table 16 below shows the summary of the theme which will be looked at in more detail below.

Table 16: The OOH media landscape influences digital transformation in an OOH company

THEME	Traditional OOH	Entrepreneurial OOH	Collective Feedback
The Media and OOH media landscape influences digital transformation in an OOH company	⬤	⬤	⬤

Legend:

⬤ The media and OOH media landscape influences digital transformation

Source: Author's own

5.5.1.4.2. Key theme findings for Media and the OOH media landscape

Competition as with any business is a key factor that was raised during the interview process. The T organisations are aware of the scale of the smaller entrepreneurial OOH businesses that have emerged over the past decade to compete against the larger incumbent firms with

DOOH. The E organisations have emerged to compete against the T organisations through differentiators of their product offering and placement.

T1TM1 reported that:

> And we managed to certainly lead the way to a large extent, five years ago we had far less competition that we've got at the moment, overtime time, what we'll see is you'll see more and more digital and that will just become more and more mainstream.

T1TM2 reported that:

> And as the quantum of digital boards increased, it was quite nice when we started as it was really just outside of the norm. And we quickly, we sort of gained control of the market. And I mean, we had phenomenal occupancies, great returns. And as more smaller companies came into the market, it dawned on us that we obviously needed to change.

E1TM1 reported that:

> Theoretically we are old faces but a new business, but we win the right to compete in the marketplace, especially given the nature of our product. We've essentially entered the market, obviously, let's call it directly competing against some of the most formidable out of home businesses that have got a lot more heritage, given the size and the nature of our product.

Regulation of the OOH media industry has been highlighted as a key factor to consider with strategy as it may create barriers. However, all 4 OOH companies are committed to the regulations and believe that they are there for a reason. The problem is that other OOH organisations are not abiding to the rules and regulations set out. Another factor that was raised was black ownership of businesses being an element to consider for the future of OOH in South Africa.

T1TM2 reported that:

> Like, the fact that people are building illegal billboards. The fact that the cities don't enforce their bylaws, those are things that are outside of our control. And we've really struggled with it. And in all honesty, we have discussed them at length. And strategically, there's not much we can do about it, you know, we've got to, we can't force the city.

T2TM1 reported that:

Your level one certificate (BBBEE) is not good enough anymore. So, ownership is being evaluated. So, there's been a huge focus on that process, which is, which is something that's disrupted business I suppose, and how you do business with it, especially in the corporates and media agencies.

T2LM1 reported that:

But there's a lot of barriers to entry, which internationally, they don't have that. And I think that's hurting the digital progress of growth of in South Africa and Africa. And I don't think they're going to fix it very soon. That's the other challenge that we face.

E2TM1 reported that:

From our point of view, if you're not, if you're putting up stuff without approvals, you're not really creating proper value. And so, it's a very important, important element for us.

I'm extremely worried about the, the clutter and the lack of enforcements, particularly. And it's the screens popping up everywhere.

The planners and buyers of OOH in South Africa are diverse and all have a different level of experience in OOH. Adoption of new products or innovations are very slow on the uptake and create barriers for growth for the OOH companies. This is more apparent in the T companies who bring the innovation to the industry, while the E organisations as discussed in the business strategy theme wait and see what the incumbents will do. T2 made mention to procurement having been heavily involved in the monitoring of contracts for OOH for advertisers to ensure they are aligned to their requirements, especially multinational organisations.

T1TM1 reported that:

As it gets more and more market acceptance, and that comes down to media planners and media buyers, and right now a lot of them, it is really difficult to teach the client.

And as I said, some of those plans are also in the infancy and the products are in the infancy, the media buyers they don't really know how they work yet.

E1TM1 reported that:

What you see in the market does not match the brief, and you question whether that was right for the client.

E2LM1 reported that:

With pDOOH my concern is with wasted expenditure, guys will buy sites that aren't necessarily relevant, you know.

5.6.1.4.3. Discussion of the key theme of the OOH media landscape

The most relevant factors that are affecting the OOH organisations within the OOH landscape are regulation and competition that has increased over the past decade due to poor regulation on bylaws. Unfortunately, as reported above, this is out of the OOH organisation's control and they therefore need to work with what they can control.

The T organisations are focused on ensuring their product placement is relevant and strategic for the future while the E organisations are focused on cementing what they already have. For any of the OOH organisations to grow their holdings this will be a challenge due to the barriers of regulation and the high competition in the areas which are sought after by clients. The OOH organisations all know that DOOH is the winning product for the growth of their business but growth is limited for now. This is excluding the cost of the implementation of the product which will come to light in Research Question 2.

Education and adoption by the clients and advertisers are a major concern, especially for the T organisations who are usually the organisations to bring new products or processes to the market. The E organisations monitor this very closely and will choose whether or not to make a move based on the success that the incumbents have had. The E organisations are small and will avoid high risk costs at any chance. They are also in a beneficial position in the industry as 90% of their inventory is in high demand, in comparison to the T organisations whose holdings are majority static/traditional OOH. This is not to say that static/traditional OOH is not in demand, but it does not offer the agility or flexibility that is warranted in the current economic climate.

5.6.1.4.4. Conclusion of the key theme of the OOH media landscape

The OOH organisations have stated that their business strategies are driven by market-oriented forces as per theme 2. The OOH media landscape falls within this, especially with regards to the positioning of these OOH organisations. The organisations need to focus on what they can control going forward; they need to look internally at ways in which they can differentiate or compete in a market that is highly saturated and unregulated. It is Important to note that within this theme is the first mention of know-how and an understanding of how things work with relation to positioning products or processes to a client, or the fundamental capability of clients to utilise OOH effectively in the market to drive value for brands.

5.6.2. Results – Findings for Research Question 2

What change management capabilities are OOH companies applying?

This question which, was first presented in Chapter 3, looks at the OOH organisations and the way in which they approach digital transformation within the company and how it is received. Here we see who the drivers of change are and how this change is implemented and received by the rest of the company. Data collected from the experts/professionals provides the researcher with a framework that is used to conduct digital transformation within an organisation. Table 17 below shows an overview of the results for this research question and is discussed further in detail.

Table 17: Change management capabilities in an OOH company
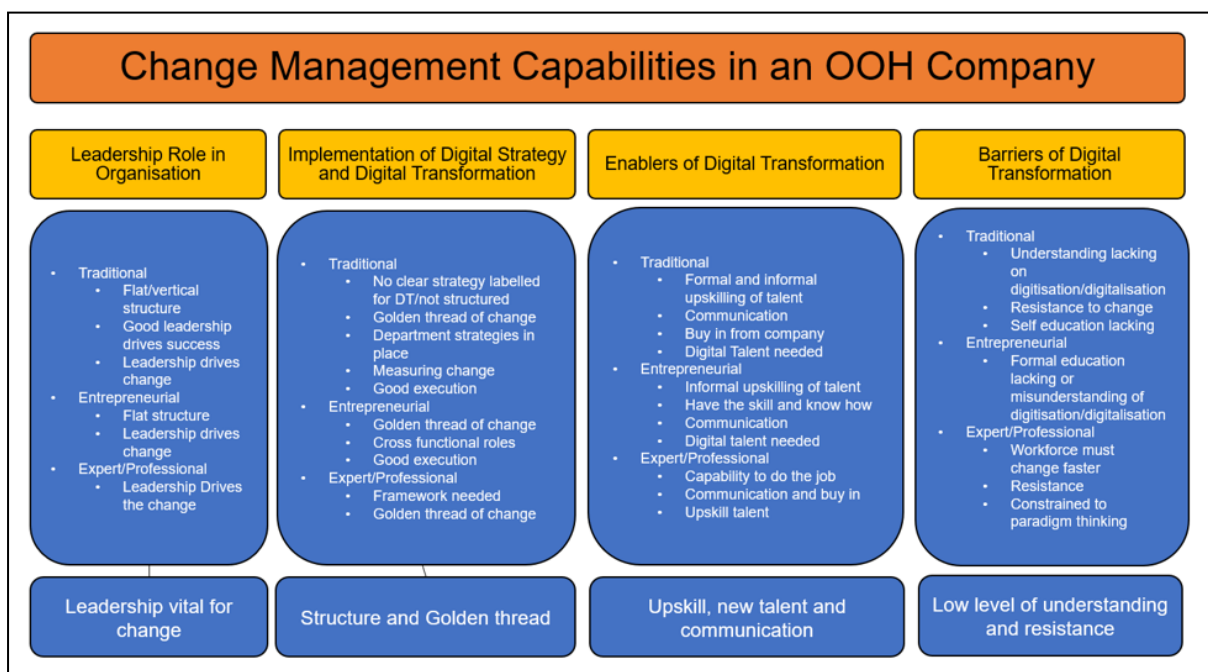
Source: Author's Own

5.6.2.1. Research Question 2 – Theme 1: Leadership role in company

5.6.2.1.1. Theme summary for leadership role in company

The T organisations have a developed flat structure, with a short vertical at leadership level which is said to be "quite flat" and leaning towards a deep horizontal management structure. Whereas the E organisations are smaller with a horizontal management structure across the founders and newly appointed employees in the business.

The underlying factor for this theme is that all 3 categories in the research project reported that leadership is vital for the digital transformation change that it is looking to achieve. The

difference is in the how which will be explored in more detail in the implementation of strategy theme.

The Harvey's ball matrix below summarises the key findings of the theme.

Table 18: Leadership role in company

Components of THEME	Traditional OOH	Entrepreneurial OOH	Expert/Professional	Collective Feedback
Leadership role is vital for change	🔵	🔵	🔵	🔵
Management structure flat	◑	⬤	○	◑

Legend:

🔵 Leadership Role is vital for Change

⬤ Management Structure is flat

○ Vertical Management Structure

Source: Author's own

5.6.2.1.2. Key theme findings for leadership role in company

The T organisations are in agreement of a horizontal structure with a short vertical section, but T2 is looking to transform to a full vertical structure in the near future.

T1, the T1TM1 and T1TM2 are adamant that it is flat, which T1LM2 agrees on but once asked directly about the structure of the company T1LM1 contradicts this theory.

T1TM1 explains the following:

> *We've got quite a few layers if I can put it that way. In terms of our management structure. You've got our junior managers, we've got our middle managers, we've got our senior managers, executives. But effectively they are each, they are vertical for a short bit from me to the department executives, and then below that, then there's the - but it's a very short distance between Junior management and senior management, it's not a lot of layers. And it's quite clear. So effectively, a lot of people are very involved operationally, in a sort of very deep structure. So, it's probably, because of that you would say, it is horizontal.*

T1LM1 reported that:

> *Vertical. We've got quite a few layers if I can put it that way. In terms of our management structure. You've got our junior managers, we've got our middle managers, we've got our senior managers, executives.*

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T2TM2 reported that:

I would say it's been relatively hierarchy already. Probably more horizontal than vertical. But I think we're trying to run with a hierarchical system, what you do want to, you want to be able to voice, we want to give people the chance to develop.

T2LM1 reported that:

Now, this is called quite a flat structure. And I'll be honest with you. So I'm a general manager, I've got a head of production and a head of sales. And then we have a team of people, we bring in XX Rand a year. It's, you know, so you know, if you don't need it, I suppose, but we didn't quite have an exact structure, it's an issue. I think with the business growingand what markets are doing and obviously, buying new businesses, and we keep on growing as big as we are, the opportunity to grow, but as to create a bit of a succession.

T2LM1 highlights the need established from T2TM2 about a vertical structure requirement.

T2TM3 reported a concern about a vertical structure:

You know, what we've seen in just my personal experience, what I've seen, you know, working for big listed company's multinationals is that once it gets stuck into very deep verticals, you know, you'd be going very slow.

In comparison to the T organisations, the E organisations are clear about where they currently are with the management structure because of the size of the company. However, there is still a clear top-level structure from the founders of the organisations.

E1TM1 reported that:

So, in a year from now, when more employees come on, and additional sales reps and stuff, there will be some level of vertical enablement. But it's, you know, we also will understand more, we all have the same discussions, we're gonna be looking at new developments, we have a discussion on because we were a small team, we have different functions within that horizontal structure.

E1TM2 reported that:

I'd say management is probably our example here. I don't think we live in, at least in my opinion, we shouldn't be in a very hierarchical type of environment, I think management can be spread across multiple entities of the business from multiple different levels.

E2 explains that the current structure is flat in their organisation but E2TM2 contradicts with a vertical explanation when asked for clarity.

E2TM1 reported that:

> *We're very flat structure so very approachable with regards to an open office plan and obviously we've got titles but I promise you that no one really pays too much attention to that. So, I guess we don't try and be definitely not trying to force the culture but it's really, we all approachable always available.*

E2TM2 reported that:

> *And again, there's no, we're very flat. So, no one's, no one's really wrong. We look at we look forward to the guys, to make sure that they're putting forward ideas, if they can get better at anything - and that happens all the time, which is quite nice.*

The researcher needed clarity on the above and asked:

All right, so basically, you saying that the structure is pretty flat within the company. So, you say it's a horizontal structure, in terms of everybody having input?

E2TM2 responded:

> *Yeah, everyone definitely has input. Obviously, the decisions are made by the three shareholders, but everyone has input as to how they think, you know, service delivery, people aren't in the trenches and find out exactly what client wants, how quickly we can do things that would turn things around. So, everyone puts forward the opinions.*

A key finding reported by Pro1 regarding structure is that a vertical structure can be detrimental to the individual, based on his experience with a sector during his career, he reported as follows:

> *Is that in those cultures, it's very hierarchical. And if you fail - you out yeah, it is this…No, no tolerance, nothing - the people they really go for each other. It's unpleasant.*

Leadership as was envisioned by the researcher has come up very strongly throughout the research project. The following key findings were reported with regards to leadership's role with change management in a company that includes high level collaboration and cascading down to the rest of the organisation.

T1TM2 reported that:

So, we've been quite fortunate - we've come up with some really good products and I think that's great because we probably got a really good senior management team that collaborate really well together so we can sit around a table and there are no egos.

T1LM1 reported that:

And it's very, very collective agreement. And then when it gets to be bolted down, I mean, we start with our CEO announcing what the strategy is and presenting it straight to all the staff, but then for the line managers or department heads, executives, and then line managers to actually filter that down to the staff so that the staff know what the particular role is, within the strategy and how they are assisting in in reaching the overall company strategy.

T2TM1 reported that:

I think that's why your senior team needs to be involved in these forums and discussions, because you have to drive change. And you also have to, you know, make people aware that they're on it.

T2LM1 reported that:

Our team, our leaders, a lot of them are very, very visionary…

I don't think you ever prepared for change, but I do know that our leadership does announce things and they do inform us of what's happening. And I think as a staff member, or as an employee, you as a co-director, whatever you are called, you really just buy into that because there's a bigger picture. And it's also not our place to question these things, you know, but you can question if it doesn't make sense to you.

With the E organisations being smaller, the role of the leaders is highlighted more strongly in terms of driving the change, and then through collaboration with the rest of the organisation. For the E2 organisation being very new to the industry with minimal employees, the leadership is currently the whole company and they execute the changes needed.

E2TM1 reported that:

Yeah, I think so. I think I think it's, it's going to stem from the three of us I think it's myself and [the two other leaders] who are gonna have to, to speak, we're gonna need to show them how invested we are in it. And they will then, it'll be what's the word it'll be the guys who work with us will naturally accept it.

E2LM1 explained the following:

So, I mean, it would be it's very simple as obviously, like maybe kind of its senior, call it executive level or shareholder level, you know, there a strategy would be discussed. And then and a kind of a meeting would be held with, with a greater team to kind of unpack that and get their input, and then and then formulate that and kind of execute on it.

There is an overarching sort of, line of experience that comes down from the leader.

The experts/professionals agree that the leadership is key to driving change but have underlined the leadership role as vital for success throughout the process.

Pro1 explains that:

The pivotal point where you drive transformation should be the highest level of organisation. If you, if one tries transformation on the exco level. It's one who decides he wants to do transformation. He doesn't have buy in, it's not gonna work. Even if he has buy-in, people are not going to let go of their domains. It's a recipe for failure. So, you transform what you've got control over.

This is really, really the difference. The ability to transform what you have control over, because if you don't have control over that, you've got to negotiate and convince, but if you are on the same level it doesn't work.

It is driven from the top, the top cascades the vision.

Pro2 reported that:

So, interventions around the before you get into this is the change we're going to bring about and this is how we're going to get you're comfortable with the change, before you get going on the digital transformation programme, is to develop the digital fluency levels of your executive team.

Pro2 emphasised that success is only as good as your leadership:

"The fish rots from the head".

In addition to the above Pro1 commented that leadership may be a hindrance to change down the funnel.

Pro1 stated that:

It will be the person that leads them that's got that philosophy to not accept change that's where they get it from. So that's typically that so that's why I say you've got to analyse the structure level for level as you go along all right.

5.6.2.1.3. Discussion of the key theme of the leadership role in a company

With the organisations reporting that the structures are flat it is evident that there are hierarchical tendencies in place with a CEO or key leaders that make decisions. The T organisations have admitted that it's a short vertical structure with many horizontal layers across the organisation that have roles and responsibilities to implement the strategy. In comparison with the smaller E organisations, which have definitive horizontal (for the foreseeable future) structures, the organisation is driven by the leaders and they lead the teams themselves on an operational level.

The T organisations are very careful to explain the role of strategy formulation and how it gets cascaded down the organisation, ensuring that people are aware of their roles within the bigger company strategy. The E organisations leadership, not only cascades the vision but also implements the strategy with the employees. The level of buy-in and understanding is translated as high from the E organisations, where the T organisations have to filter down through to a number of levels for change to occur. It has been established that strategies are accepted from the lower levels within the T organisations as there is subordination and belief in the leaders.

The experts/professionals are adamant that change has to be accepted and driven from the leadership and this must be cascaded through the organisation. The element of driving the change from the leadership level is key throughout the organisation, not just for the next level to implement.

5.6.2.1.4. Conclusion of the key theme of the leadership role in a company

Leadership is clearly defined within the T and E organisations as the drivers of change or the ones who create the ideas for transformation to occur within the business. The leaders are the ones that are there to guide and position the company for success. Strategies are agreed upon at the leadership level and then communicated to the rest of the organisation as the way forward. A high level of trust is needed throughout the organisation to deliver on these strategies to ensure relevance in the future. The more complex organisations, the T organisations have various levels within the organisation to successfully filter or cascade the vision down. Whereas the E organisations are small and change is filtered quickly through the leadership who are also heavily involved in execution of the strategy which will be discussed further in the next theme.

5.6.2.2. Research Question 2 – Theme 2: Implementation of digital strategy and digital transformation

5.6.2.2.1. Theme summary for implementation of digital strategy and digital transformation

The theme of implementation for strategy of digital transformation has been separated into the organisation's response to the way in which strategy has been implemented or should be implemented, from a weak and a strong positioning of the responses. The majority of the interviewees in the 4 organisations reported that implementation and execution has been good, with departmental strategies or cross-functional teams in place - creating a golden thread of change. There are no clear or framework digital transformational strategies in place in the T and E organisations, but they both have a digital strategy. Measurement of success differs from the T and E, where T focuses on measurement internally and E focuses on customer experience. The T organisations believe that strategies should be reviewed more often and the E organisations believe they are agile enough to implement change as and when required.

The below Harvey's ball matrix gives a summary of the key findings of this theme.

Table 19: Implementation of strategy for digital strategy and digital transformation

Source: Author's own

5.6.2.2.2. Key theme findings for Implementation of digital strategy and digital transformation

From a weak standpoint on how well strategies are implemented within the organisations the following was reported on implementation of digital strategies or transformation within the workplace:

T1TM1 reported that:

I think it might be, it's probably it is happening, is probably not labelled like that. I think a lot of, a lot of the places we push exactly that, but we sort of pushing it with, with, especially internal processes will lead to sort of like trying to just do it better, quicker, faster kind of thing. So, but it's not really labelled digital transformation. But each department is certainly adopting technologies that make the performance of the ultimate responsibilities and tasks easier and more efficient. So, everyone, everyone is doing that in some form or other.

It is clear from the above that the company is doing digital transformation, yet they are not aligned to a strategy or framework that is labelled digital transformation.

A weak positioning of implementation for digital transformation is highlighted by the following:

T1LM1 reported that:

Since I've been in Outdoor, I can't say that I've seen any major preparation of the staff. What I had seen is from the marketing department, for example, we'll get email as this is what's happening. That's what's happening. But I must be honest with you, I think the first time I found out about all this amazing technology was when I attended the first strategy, when I started at outdoor, whether there was something done prior to that, I don't know, I can't comment.

Even in terms of (inventory management system), I think there was preparation in terms of departments affected by it on training and upskilling them to make sure that they can operate the system optimally. But I don't think that there was any sort of awareness or change management with the staff to say, you know, what, guys, this is where we are heading to this is what (inventory management system) can do. I don't think it was done throughout the company.

T2 is similar with their responses regarding a defined strategy.

T2TM2 reported that:

I think that it is (important for success), I just think that the business thinks about it a little bit differently here. If you like, it is not a topic. It's not an urgent topic on the table. And I just think the business needs to think about it differently and maybe because it has been siloed. I haven't seen a chart that shows static inventory vs digital inventory.

Here products are mentioned within the digital transformation strategy and not the processes or the people.

This links back to T1TM2 in previous themes making mention of innovation in products, and also to T1TM1 about being first to market with products.

T2LM1 states clearly that:

> *I haven't seen a digital strategy. I know there is one per sub unit. So, you know, it's a big box that we need to tick around innovation, which falls under the digital space. And we tick the innovation box by doing (innovations on products). And we're trying to get all clever and creative, but in terms of actually moving to that, getting over that hurdle, it's I call it the digital hurdle. When you get over it, I think things will be a bit easier. But for now, I know that is probably a group plan in terms of bringing in the right resources to be able to do activities that will then filter into the different sub competencies.*

Linking towards strong positioning of digital transformation from T2LM1, there are departmental strategies in place and there are discussions of a group strategy to bring talent in to assist with digital activities. T2TM2 reiterates the different strategies by reporting the following:

> *In the way that you phrasing it, it's not being driven across the company, the different business units are doing what they need to do. So, so each division, we see it as a different company within the group, they have a strategy. So, there will be a development strategy, there will be an operational strategy, there will be a sales strategy, they will be a marketing strategy, and they will be sort of research,*

T1 also reports on departmental strategies with the following but is filtered down from the overarching company strategies:

T1TM2 reported that:

> *So, I mean, what is nice about it is, we all sit together, and we look at everybody's strategy, and we'll understand exactly what he or she is trying to achieve.*

> *So, at some point, if we decide we're going to move forward, then we break it down into subcommittees, and we make them as wide as possible.*

T1LM2 reiterates this:

> *There is an overriding company strategy, but certain departments have the roles to fall under, they have their own little strategy to be able to fulfil their main strategy, for example, the developments in implementing cost measures, cost saving measures on our structures to enable the company to reach the profitability strategy.*

The T organisations made commentary on having a more structured approach to implementation:

T2TM2 reported that:

> *No, no, definitely. So, there are there are plans, they do get put together by the different business units, this regular management meetings, and so on. But but I do think it could be better, could be more structured.*

T1TM2 reported that:

> *I don't think it's ever going change, but I think the methodology is good in terms of, you know, it's not like its one person's problem ever, you know, it's we put everyone together for what it is we're trying to achieve. And then, I think, one failing in behaviour in our business is, we don't, we don't document stuff enough there is no user manual on the changes.*

Here T1TM2 discusses changes of products and processes and how efficiencies work within the business to ensure value. T1TM2 believes that cross communication will always be in place with reiterations, but none of it is documented.

The E organisations, which are built on a digital strategy from a product positioning standpoint are ensuring that the strategies are filtered through the organisation within departments or the leaders acting through a cross-functional team.

E1TM2 reported that:

> *The brand is going to bleed into every department of the business, there are different departments like the production side of the business side, or whatever the case may be, they'll definitely be, you know, let's call it once. They're siloed strategies, but there'll be smaller strategies in place for different departments, ultimately, still trying to achieve and respect what the overall brand is.*

E1TM1 mentions a cross-functional application once the strategy has been formed:

> *So, in a year from now, when more employees come on, and additional sales reps and stuff, there will be some level of vertical enablement. But it's, you know, we also will understand more, we all have the same discussions, we're gonna be looking at new developments, we have a discussion and because we were a small team, we have different functions within that horizontal structure. So, some are of the more operational focus a little more finance focus. So, we'll split out the actual tasks themselves.*

The more established E2 organisation is adamant about a cross-functioning team that delivers on small strategies together to enhance the overriding business strategy.

E2LM1 reported that:

> *And when I say small, it's obviously like this commercially, conscience, sort of, you know, like, everyone, everyone is encouraged to sort of, not just be like a salesperson or production person, or campaign manager, you know, you should have the ability to be an allrounder, and kind of cross functional in that, and sort of wear multiple hats, as they say.*

> *But definitely, you know, we've got, processes are in place, you know, and solid foundation processes in place, in order to sort of sustain the growth to ensure that we, we can kind of remain on that trajectory and not drop balls. But yeah, to answer your question, I definitely think, you know, a lot of the strategies that we put in place, and there hasn't been these that these kinds of big, big blue-sky strategies of logistics, like go do this, you know, it's been very, very small.*

Linking to implementation and departmental strategies is the integration of change which needs to be filtered through the organisation. Even if there is no clear strategy for digital transformation, the organisations are trying to implement strategies throughout the businesses with an overarching strategy or business plan. The experts/professionals give a clear understanding of what is required for implementation of digital transformation within an organisation.

Pro1 reported that:

> *So, implementation involves a different number of strategies that you can actually follow through on. There might be the big bang approach, so I just close off, kill off this, there might be a gradual implementation where I go, for example segmentation of a product stream, right? So, it's always about, you've got to have a framework, which is basically - how do I go through this process? The implementation framework in terms of phases of soft and hard changes are needed.*

Pro2 reported that:

> *So, it comes down to, there's no fixed answer, in my opinion. So as a starting point, is take the word digital transformation, take the word digital out of your conversation. And it's great to sit down and say, we are going to develop a strategy, a corporate strategy, to make sure that this business is relevant by 2030… What would be that reasonable value proposition we take to the market, and I would offer the market and then you use*

that value proposition, you've got to develop, you know what the potential value proposition is, and once you've got that in place, is to reverse engineer that into the technology enablers. And the changes inside the organisations that that would have to take place. So that is one stream, right?

The other way of doing it, if you don't have a specific answer is to say, as part of our digital transformation strategy, is that by 2021, at the moment is that by 2022 15% of our revenues need to be digitally enabled and you need to define what digitally enabled revenues are. And by 2023, they're going to be 30% by 2030 50%, etc. So, what you forcing is the business to move away from analogue plays into digital transformation plays before you know what the answer is. So that becomes the principal for the strategy, that principle gets given to the various functional areas and they've got to go figure out how to create those new sources of revenue.

The final key finding relating to implementation is that it must be measured. All OOH organisations will inevitably measure success through revenue growth and generation but they also look at other factors such as employee performance and strategic updates on a regular basis with regards to relevance.

T1TM1 reported that:

We have key performance indicators for each person, and they are well defined, well structured, and well measured. We then have our strategy review; we measure that every quarter to see how we're doing against it. And we then at those quarterly updates, we sometimes decide to discard some, some action plan for some strategies and replace them and then we'll move along so it's not really stagnant it's always a moving thing. And again, it's not, it's not a flick of a switch tomorrow or a change that's going to happen, it is gradually changing.

T2TM3 reported that:

I've seen you know, so much time and effort being put into strategies and so little in the measurement and the execution you know, and I mentioned measurement because the measurement to be is extremely important so I think sometimes strategies deemed to be very sort of pie in the sky, deemed to be very you know, we've got to do more of this and more of these, not enough measurability. And so, with our spread of strategies in our dashboards we try and create some sort of a measurement with it as well that it uses on a regular basis quarterly measure your execution of a strategy.

E1TM1 reported that:

And so, for us it is we will make mistakes, ensure that we make decisions on everything and we report on it and we give ourselves a specific date in terms of when we have to make a call on this and by when. And so, I think, for us being a small business side of things is Yeah, we're just going to make the decision to move on.

5.6.2.2.3. Discussion of the key theme implementation of digital strategy and digital transformation

With the key findings of this theme, it is evident that the T organisations have a very structured approach to strategy and how it is implemented down to the rest of the business. They utilise the talent within the different divisions or departments to execute on the strategy by informing the business what the strategy is. When changes are needed, these changes do get done during review processes but structure and measurement seems to be weakly implemented with performance of employees being key. There is a big focus on products and positioning of the company within the OOH landscape and not a lot of focus on implementing change within the company to enable the employees to deliver on the strategies that have been put into place. A key finding is that although the incumbent firms are relatively large corporations, they are quick to change strategies if something is not working.

The E organisations are confident in the implementation of their strategies and this is due to them being very close to the organisational capacity of the strategy. They are not only leaders but they are the ones who are actually doing the implementation with cross-functioning teams or divisions. They are incredibly agile and have a focused strategy of digital, whereas the T organisations have to manage the relevancy of a number of different factors within the business, including and not limited to, traditional/static media. They have minimal big strategies and are focused on ensuring efficiencies for client experience as a measurement. Unlike the T organisations they do not have big overheads about which to be concerned. Both OOH categories mentioned structure as key to implementation, however, the E organisations see this as something relevant for the future when they have more development.

When it comes to digital transformation as a strategy that is implemented, T organisations have reported that they do not label this within the strategy - it is part of what they do within the strategy. As reported by Pro2, there is no need to label a strategy as digital, as long as you are ensuring relevance for the business in the future. The E organisations are built on digital strategy and it is part of their business plan as discussed in prior themes.

5.6.2.2.4. Conclusion of the key theme implementation of digital strategy and digital transformation

The T and E organisations are confident that they have implemented and executed on their digital strategies over their lifespan but believe that there are improvements that can be made in future. Structure and measurement of the implementation is a key factor going forward for these organisations.

Based on the discussions with the experts/professionals, it is evident that a company needs to look inward for what they want to be perceived as with a value proposition to the market. The company needs to ensure that the execution of these desires is solid, with a framework and goal clearly defined which will enable the implementation across a cross-functioning team.

5.6.2.3. Research Question 2 – Theme 3: Enablers of digital transformation

5.6.2.3.1. Theme summary for enablers of digital transformation

Within this theme of enablers of digital transformation, the research project starts to elaborate on leadership and what the company does in order to ensure the relevance of its employees within the business. The themes reported on above with the results captured, have indicated that both T and E organisations have been successful in product development and innovation, where the companies have seen success. There is minimal mention with regards to the processes or strategies of ensuring the people of the organisations are ready to be part of the digital economy through digital transformation. This theme will formulate an understanding of how these organisations are enabling their employees for relevance and successful positioning in the competitive landscape.

The Harvey's ball matrix below, provides a summary of the key findings of this theme.

Table 20: Enablers of digital transformation

Source: Author's own

5.6.2.3.2. Key findings for theme enablers of digital transformation

Formal and informal training was spotlighted in this theme as the main way in which the organisations enable their employees for digital transformation.

T1TM1 reported that:

> Definitely, you know, I think that sort of goes back to really assessing your key performance indicators for each person, that are well-defined, well structured, and well measured. And then in that we identify opportunities, people also bring those opportunities to the table to say, they'd like to be there. So, I'd like to advance in this area or that area, the next. And generally speaking, in, you know, we take those on board.

> And, obviously, sometimes budgets are a bit tight, but most of the time, we find a way of doing it, and we provide opportunities for staff to expand their knowledge, whether it be through training, traditional type of training, or external service provider training through the various business schools, and also visiting, visiting overseas seminars before COVID, overseas seminars and, and things like that, to, to enhance skill sets and knowledge and also to kind of see what's out there. So, we generally have been doing that for some time.

T1LM1 reiterates this by aligning to digital needs:

> In terms of our thinking, of where we go in the skills that we need to uplift, definitely aligned to more digital, we want to be able to focus on the digital skills, focus on the skills that we are going to need.

And then mentions hiring of talent too.

T1LM1 reported that:

> I would think that our leaders did see what is going on out there and start to bring things in and start to employ people who have the skills for the business, even if we hire somebody with these skills, digital is changing every single day. And if we don't keep our people updated and trained, they've not gonna, be paid for what's coming in three years' time. And that goes back to my point of, I don't want (an executive) coming to me in three years' time saying I want a person who can freaking speak to an AI robot. Yeah, I want to start training somebody now already, so that in three years' time, they can speak to an AI robot, and they've got the skills that you need for (the) vision. The focus needs to be a lot more.

T1LM2 gave reference to formal and informal training that has taken place within T1 that has helped her understand new opportunities.

T2 believes the upskilling of staff is vital and the following points were raised by the participants:

T2LM1 reported that:

> *You got to educate them, you got to, they need to learn they need to start with that first, you've got to make it part of how they do their jobs.*

T2TM2 reported about getting experts in to discuss new trends with the business:

> *We've recently added quite an expert presence to the entire business, about programmatic, you know, coming out of the digital world. So, we upskilling the entire organisation, you know, as part of the future.*

T2TM1 reports about progressing staff through a company academy:

> *Depending on you know, what's going on in the lives, the experience, etc, right, and the business, but then there's also a functional side, we absolutely are going to drive people in terms of great, great development, functional skills that they need to learn. You've probably seen in the media, that we've also launched as part of the human capital team, is there's a whole (company name) academy that we started, and that is absolutely geared to develop and upskill our different, you know, people in the business of the organisation at all levels.*

T2TM3 as with T1LM1 made comment about hiring the right talent:

> *I think it's; I think it's a bit threatening on the digital side, I do think there's a portion of the workforce that needs to upskill, learn new skills and actually stay relevant in their environments. And I think it will come in, it's both, but you must get, you might get young superstars, intriguing and coming into the market - talent in my opinion, is a global issue in our industry, and it's something that we, we need to also be, you know, fixated about growing and developing as the industry.*

The E organisations hired from the initial start-up individuals that had the right skill set and knowledge to grow the business through the digital strategies set out as a DOOH forward company, however they are aware that there needs to be continuous upskilling or even new hires for advancements in technologies.

E1TM1 reported that:

I've gone out to get talent, I think, over time, it's something that'll be discussed more whether it's through events, or whether it's through other education platforms, where, you know, maybe just supplementing fees for courses, whether it's digital marketing, whatever it is, it's going to be critically important for us in this whole business, to, to, to do and understand marketing and advertising as a whole, rather than just a billboard advertising because we're part of the larger media mix.

E1TM2 reported that:

And as we grow, that's definitely going to be part and parcel of, you know, developing people hiring the right folk, and ultimately, essentially, making sure that they're equipped to be the best in the marketplace, whether that is providing solutions, and ultimately knowing how consumers are gonna want to buy or how they're gonna want to essentially do or conduct business and we all need to ensure that whomever we bring on board or is included, that we are well equipped and prepared for it.

E2 has been focused on the initial growth of the business and is aware of needing to push education harder.

E2TM1 reported that:

So, anyone who joined the business we started, that was the plan. The plan was already in place. In terms of training them, I think, even for me, this programmatic product is still quite new for us. But we need to make a concerted effort to do it. And to, to, I mean, I'm aware of all the different stuff and what can be done and then we get this training and stuff about it, we're not doing it we're not pushing it.

E2LM1 makes a statement about an intrinsic drive to know more:

I mean, I would love to be competitive, you know, in the sense of like, my knowledge and my experience. I think that, once again, it goes, it's up to me, you know, I need to kind of, you know, maybe read a little bit more and do a little bit more research, I think, from like a, an EQ and an IQ perspective. Definitely, I believe I'm capable of being competitive. So, I think it would come up, it would be up to me to update myself on that knowledge in order to empower myself. Yeah, I mean, I think one, you know, knowledge is power, you know, and, and kind of the one who knows the most, you know, in some, in some spheres, wins, you know, so it would be about sort of getting relevant content in, relevant information.

Pro2 highlights the importance of the right resources for changes to occur:

So that goes hand in hand, if you're not developing, you cannot progress into new things, unless you've got the resources to progress into those new things, right. And then again, it depends on what initiatives you're looking at, if you're looking at the digital transformation, or the transformation are the core of the business, there's a, there's a good possibility that you can develop and train resources internally, and get them to transition with the organisation. It is quite doable.

And, and then there's the innovation place. And let me let me unpack the digital transformation play. First one is, again, digital transformation is not about the technology, it's about defining the business ambition that you have for the business in this digital economy. So, you'll know that this is your ambition. To achieve that ambition, you're going to have, you're going to have to leverage a certain type of technology to give you the capability to enable that ambition.

The hiring of new talent is a factor that has been raised by the organisations for business relevance in the future through digital transformation as mentioned above with further highlights below.

T1TM1 reported that:

So, there's quite a lot of that. We also in specific incidences, recruited people to do that, directly in the new digital world.

T1TM1 reported that:

Most of its internal, you know, I think some of the staff, they've been on courses to upskill themselves, but on the technical side we are particularly fortunate that we actually had this (technical) resource that happened to come along. And was, it was acquired through the business and has driven a lot of maybe not the thinking but a lot of the implementation and I think that's where a lot of it goes pear shaped, it's fine to sit around come up with the wonderful ideas but someone on the ground has got to actually make it happen.

But and I think for a lot of staff it's been like a natural evolution where they (staff) didn't know much about digitising, we've got experts in to come and talk to the staff from a sales point of view, you have to educate them around digital, what the vernaculars are, you know, what the conversations are about - why it works, why it doesn't work, what the shortcomings are, so they understand it a little bit better. But I think where it always falls down is from a technical point of view. And we were fortunate that we had these technical skills. But a lot of the thinking still comes from a senior management

perspective of you know, where to from here, and what the next what the next big thing is, and that's, you know, it's just the way it is, I suppose, from a strategic perspective.

T1LM2 reports that people in the organisation will lean on the individuals who are equipped with the right digital skill if need be:

And some people aren't the biggest digitally in terms of computer digital and that sort of thing. But then they can go and ask somebody who is more digitally minded and get their feedback, so people are asking the right questions now and going to the right people to be able to understand so that they can be competitive.

E2LM1 explains that for the E2 business, hiring of talent must make commercial sense and the person must be exceptional:

But if someone's really amazing in what they do, and what they know, and is going to take it to the next level, then I would definitely say, oh, we should get them on board. Yeah. But I think it also comes down to commercial sense, you know.

Pro1 makes a clear statement that individuals of the organisation must also have the capability or ability to learn more, he states that:

Understand the people who do the work, do they have the ability to change?

HR people do competency profiles, we discovered that those guys didn't have the ability to change, so they could run the existing business and we would start a new team to drive the new business.

The importance of communication in the business for change has been a factor for enablement within the organisations for the buy-in of the employees.

T1TM1 reported that:

So, I think there's enough evidence that has indicated to people that "I" need to change with this thing, otherwise, "I'm" going to be shifted off the bus. So, it comes down to personal choice that you need to make that they're either going to get onto this. But if they don't, they will find themselves leaving voluntarily, or involuntarily.

T1TM2 reported that:

It's a whole collaboration of all different resources within the business that are sitting around on a weekly basis, getting an update of where we are, and then discussing, is this the right way forward? We have this problem. What about that? And these are the problems we are bringing them to the table. And I think that's, what's keeping us ahead of the competitors, because it's not, I think, what everyone realises it's not a sales

problem. It's not an ops problem. It's not a marketing problem. It's a (company name) problem. It's a (company name) initiative.

And I think when it when it comes down to understanding, why are we doing it? How are we doing it? Everybody who should be in the loop, is in the loop, as opposed to finding out after the fact and I think that definitely makes quite a difference to the success of any of these projects, and the ability to change them on the fly. So, none of these things, in many cases, we are on a voyage of discovery ourselves, we have an idea, and we try to figure out how best to implement it.

T1LM1 reiterates that there is clear communication:

Whenever there's something new going on, we do get involved with it, and we do know about it, and we get trained on it.

For T2LM1 there is a high level of trust through the communication:

And I think as a staff member, or as an employee, or as a co-director, whatever you are called, you really just buy into that because there's a bigger picture.

Buy-in is recalled from the discussion with Pro1:

So, the way you measure and draw people toward common goals or strategy is quite critical. Because we don't say this is a company philosophy, we are going to transform from a manual. It's a people driven process into an automated software business. It's a bit of a challenge. But for everybody, so if nobody buys in, it doesn't help.

Pro2 reiterates this with:

So, you've got to think that the whole organisation needs to sort of come together. But it's got to be done in the right sequence. You announce that change, why there's a change, where change is going to happen, train people up, monitor the change, implement the change, etc. in a digital transformation environment, I think part of the driving adoption of change is making sure that the stuff you deploy is intuitive, right?

For the smaller E organisations, the ability to enable change is quite fast and agile due to the scale of the business and the driving forces of the leadership enforcing the change, as we have seen from the T organisations too.

E1TM1 highlighted an example of how the company makes decisions and the following was reported:

So having heard all the back and forth, having heard the concerns and we agree there are definite decision points and everything. And so, for us it is we will make mistakes,

but we ensure that we make decisions every day and we report on this and we give ourselves a specific date in terms of having to make a call on this by then. And so, I think, for us being a small business - side of things is, yeah, we're just going to make the decision to move on.

E2TM1 reports on the following of communicating new ideas/products:

So again, we develop the product. We educate our team internally on the output of the work, how it influenced it, what the selling points have, and you answer the why it's different. And then we relate and solve it. So yes, there was leadership involvement, and then a filter down to the team.

When questioned about the company buy-in, E2TM1 responded with:

It's immediate.

5.6.2.3.3. Discussion of the key theme enablers of digital transformation

The experts/professionals believe that upskilling of staff through formal and informal education is vital to enable digital transformation. The key focus is to make the employees aware that the reason for the drive of education is to remain relevant.

The T1 organisation makes it very clear that they upskill their staff through formal and informal training, and this is reiterated throughout the participants from T1. T2 makes a comment of educating and ensuring that the staff know what they need to do. The difference is T1 makes comments about formal education, that the staff are able to put forward requests to study further etc. Whereas T2 does not mention formal education but has an academy for the staff that is internal and also brings in professionals on a topic to assist with training or the company educates the staff.

The E organisations have built their teams from scratch that are already digital focused and have the know-how when it comes to DOOH. However, both organisations are attuned to the fact that they need to drive education harder both formally and informally. Discussions and future proofing are always had amongst the teams but there is a definite need to increase knowledge going forward. An important discovery within this theme is from E2LM1 explaining an intrinsic desire to know more and upskill.

For the T organisations, communication throughout the company is vital for implementation of new digital processes or products. For T1 there is the notion that the process is far-reaching and in-depth ensuring that there is success and agility where needed. For T2 there is a high level of trust, the team gets told what to do and they do it. We see this level of trust also

permeate in T1 where the LM participants recall how strategy is implemented and they believe in their leaders to do the right thing.

Hiring of new talent is considered by the T1 organisation to ensure relevance in the digital economy. Technology is the major factor for T1 for success of new products, most importantly the implementation. T2 are currently not considering new talent as needed to progress further, but changes to the business plan will allow for an increase in talent within the organisation.

5.6.2.3.4. Conclusion of the key theme enablers of digital transformation

As the researcher is getting closer to understanding how an OOH organisation utilises change management as an enabler for digital transformation, one can see that education and communication are the driving factors behind an organisation's progression into the digital economy ensuring that the organisation is well equipped to be competitive in the landscape. There are evident gaps noted with regards to education for T2 and the E organisations which they are aware of and will look to changing this in the future. Talent is key, whether it is learned or hired, for the role needed to progress the organisation further.

5.6.2.4. Research Question 2 – Theme 4: Barriers of digital transformation

5.6.2.4.1. Theme summary for barriers of digital transformation

Highlighted above the researcher reported on key findings of enablers of digital transformation that are happening within the organisations. Unfortunately, there are hurdles or barriers that will make the digital transformation process difficult and these are highlighted in this theme. The main challenges that have been highlighted are a lack of understanding of digitisation and a resistance or reluctance to change or adoption. The experts/professionals report on some key pointers for barriers of digital transformation.

The below Harvey's ball matrix below gives a summary of the key findings of this theme.

Table 21: Barriers of digital transformation

Components of THEME	Traditional OOH	Entrepreneurial OOH	Expert/Professional	Collective Feedback
Understanding on digitisation needed	🔵	🔵	🔵	🔵
Resistance to adopt or change	◐	◐	◯	◔

Legend:

🔵 Understanding on digitisation needed

◐ Some hurdles or resistance to change or adopt

◯ Make changes to the resistance, must change faster

Source: Author's own

5.6.2.4.2. Key findings for theme barriers of digital transformation

The T organisations made some comments regarding formalising processes of digitisation in an understanding that it may help with enabling staff to adopt or change faster to the new products or processes introduced. However, it is more of a hurdle than a barrier and they are aware of putting in procedures to assist this process.

T1TM2 reported that:

> *Or it's just like us, it's sort of word of mouth and you know, use this to get that, or it's done like that. So, I actually don't know, but that's probably one of the failings that we have. But on the other side of that coin is we don't have massive staff turnover. It's not like we've got this, you know, this continuous problem where people are leaving and new people are coming in and you need to train them, but there's no manual to train them.*

T1LM1 reported on an example where more could have been done to enable the staff:

> *But because there wasn't enough training done originally, I felt that although it's very similar, I still think detailed training courses would have been necessary and should have been held with the staff.*

> *But I would have done a lot more in terms of this in the background, this is where we were, this is what we can do for you, I would have spent more time showing the wows of the system to get the buy-in, because there's still a lot of staff who think the system is useless, and it frustrates them.*

On another topic, T1LM2 reported the following:

> *In terms of programmatic and apart from the people that know, I don't think anyone's programmatic ready because it's so flipping confusing. You've got to have a thinking brain to be able to understand programmatic. So yeah, I think that that's been a difficult transition. I'm not sure if we were all 100% ready for it when it was launched.*

T2TM2 reported the need for further training:

> *I think there has been some of that that are typically lacking in some areas it has, what was one of the things that did come back in the survey that people felt that there wasn't enough of that.*

T2 also made comments of constant learning that is needed in the organisation.

T2LM1 reported that:

> *And this is one of the things I actually raised to say that it's a weakness in our environment would be nice if we could get snippets of information, once every month that what's going on in the industry, what's happening globally, locally.*

T1LM2 and T2TM1 reported on self-awareness to learn more as a driving factor, for individuals to do their own part.

T1LM2 reported that:

> *But I do think it's, it is something that you need to work on all the time to be able to understand it, it's got to be something that needs to be fluid, you know, not like a traditional board. So, a salesperson, must understand what happens in the back end on a digital campaign, you've just got to educate yourself and constant training, whether it's internal or external.*

T2TM1 reported that:

> *I think so, you know, you need to keep on educating yourself. Then ask questions and being inquisitive. And I think also surround yourself with people that understand the space.*

For the E organisations consistent learning was raised as a factor that needs to be implemented and ongoing.

E2TM1 reported that:

> *So, I think we've been lucky in that we haven't had to go through that change. So, anyone who's, who's joined the businesses we started, that was the plan. The plan*

was already in place. In terms of training them, I think, even for me, on our side, this programmatic thing is still quite new for us. It's been great working with Broadsign Reach guys, I mean, I know for a lot of (media owners) are the guys that we use. And they've been amazing. And, you know, if I am honest, I don't think we've done enough training as yet, but it's just been quite there's been a lot going on.

E1TM1 reported that:

And so, you know, everyone there, we haven't had to do training interestingly, but like I said, we do seem to keep abreast of what's happening. We do, look at what's happening at other people's billboards, what are they doing, reading, reading articles, that type of thing. But when people come in, without a doubt, there's going to have to be some kind of training.

E2TM2 reported that:

I think you need to be as knowledgeable as possible, making yourself relevant. It has changed, the people we deal with have changed.

Resistance to change or hurdles with adopting change have been highlighted mainly by the T organisations due to the legacy of changes that the organisations have had to go through in comparison to the E organisations who from start-up were digitally ready. However, there were no major challenges that did not allow them to progress further.

T1TM1 reports on an example when DOOH was launched:

Back in the day, when we first started with our digital screens, as long ago, as, say, 2011 and 2012, the performance of those assets was not very good. We had four digital screens at that stage and they weren't doing well. And we, you've got to have bravery and courage to continue and pursue that because you putting kit in the ground that's very, very expensive. Then you backing a horse that you haven't seen race before, and you pushing. So, it's been that you had to have that bravery to do it.

T1TM1 makes a comment regarding resistance:

But people are generally a bit wary of change, they need to be convinced. And I recall you know, I think we've had there was sometimes difficulty to find bright people, it takes longer than you want it to take. So, there might have been a gap where we've been stretched, but no major problem.

T2TM1 also made comment regarding talent onboard to fix the challenges of adoption:

So, I'll use some of our digital guys, you know, they've launched (product), in 2007, with us. And now there's programmatic and they assume they know everything, ya they keep up to date with things, but you know, we bring new people in, we bring external experts in. And there's pushback, because they believe they know the environment, they know how the product works. And you need to almost temper them back. And so, you say to them hold back, you have to have a habit of teachability about you. They don't know everything; this is the new trends development. So, you do find that, but it's how do you manage that? I think that's why your senior team needs to be involved in these forums and discussions, because you have to drive change.

T2TM3 reported the following with regards to technology advancements:

Yeah, definitely. I mean, it's been a good, you know, you check worldwide trends. You know, it's just, it's a no brainer, you know, anything. And, you know, what, what scares a lot of people this is how quickly things change.

T1TM2 reports of industry adoption challenges:

And even in dynamic, you know, we've done some stuff, which we thought was fantastic, and we even made people fall over it. And it's still fantastic. So, it's not that's not the problem, it's just that, you know, the market might not be ready for it or for whatever reason, you know, it's, it's, it's maybe just a little bit too out there, you know, or maybe clients don't get it.

T1LM2 reiterates this with:

Our digital space, I mean, we one of the most innovative outdoor companies out there, we've brought solutions to the market to help our clients, unfortunately, not all of them are quick on the uptake.

T1LM1 recalls an internal buy-in issue and reported that:

And it's not because of the system, but it's because they haven't bought into it. And they just not putting the time in to learn the system and get to know how to do certain things. And with you know, with everything, practice makes perfect. Nobody expects you to get it right the first time.

T2TM1 reported that:

There's always pushback, you know, especially from people that's been in the organisation, that's been doing a certain function for a long time.

The change is not as obvious at this stage for people for them to need to say to themselves, oh, my goodness, I've got to get prepared. We're not there yet. We are getting there quickly, but we're not there, I think, I think the real impact is when it's going to start impacting people's jobs.

T1TM1 reports on the reality of people's jobs being impacted if they do not change:

But if they don't, they know found themselves leaving voluntarily, or involuntarily. They won't be, they won't be employed into the future, because the skill sets that we require today are different from 10 years ago. So just another result with automation on all of the processes, we have reduced the number of sorts of admin type positions because computers to do more and more of the work. And then, those jobs that can get taken up by different people.

So, you then have, for example, like a dynamic business salesman, as opposed to a clerk who's doing paper pushing. And your mix has to change. Some of them have to be different people some are upskilled. So, but I think the most the most important thing is that people know the journey. And they have to make their own personal decision as to how they're going to partake in that journey. Are they going to take it all or they're not going to, because if they don't change with it, they will run out of road ultimately?

The E organisations made comments about challenges with programmatic that will be addressed further in RQ3 findings regarding control of business, however E2LM1 made comment as follows that could be seen as a barrier:

Yeah, definitely. I mean, dude, I think it's, like, from a sales perspective, there are a lot of people and from what I pick up in the industry, they're a little bit concerned about it, because it does make you seem a little bit redundant.

Although E2 organisation is built on digital, programmatic is new to them, E2TM2 reported that:

And I think the digital transformation, I haven't, we haven't done that. I don't think that the sales people have embraced it. And probably because they don't understand is probably a bit scary. So, I don't think that the individuals have embraced that, how they could. And again, on the other end of the spectrum, I think they also don't deal with people, the people that they sell to are the traditional stuff, even the digital, they're not doing, they're not buying the digital stuff yet. So, I've kind of become the go-to person for that. I'll deal with the people. So now I don't think they've embraced it as well as they could have. I think they've been scared. I think people are a bit scared.

Pro1 highlighted his opinion that formal training is not needed for digital transformation:

> *Understand what they need to do, like actually physical experience. And what did they learn as we go along? So, no need to do formal training, it's actually on the job, proof of concept, I think that others like to use the term agile - but it's actually exposing you to the actual real world.*

Pro2 had the following to say in terms of resistance to change.

Pro2 reported the following:

> *The only thing that that's important as we've got to do it quicker, and more deliberately about transitioning workforces. So, where we are hearing examples of organisations that automatically not cutting back workforces, etc, I do think is that the market is not dealt with it, put them in a very difficult position.*

> *And then the other thing is that if you transition, if you digitally transform your company, against the right business model, you're doing it to unlock additional value inside the business. That means that you do expand the footprint of the company. So, this is fear that if you transform a company, that you lose jobs, but the reality is if you transforming a company for the right reason, the company should expand and grow. So ultimately, the company has more units that it needs in it does certain jobs, that will be irrelevant. And those jobs typically have negative attributes of low productivity levels, low efficiency levels, error rates, safety, etc. Those jobs are going to be lost, they just get lost quicker. So that's on the digital transformation side. If you on the innovation side of the business, and you're wanting to move the business into a new adjacency so something that the business it's not core to the business*

> *You're going to there's going to be resistance. Many people will say, I'm comfortable with change. They're really comfortable with change when they driving the change. But when change happens to you, people become very fearful. They lose positional power, they pray for the jobs, they're afraid for the consequence, who they're going to report into a lot of those emotive things. So, any kind of change inside an organisation is fraught with, with resistance. And that's why important that it's important that if you do bring about a significant change inside the business, be swift, be deliberate, you know, organisations that are soft, in trying to bring about change management, all they do is they exhaust the business.*

> *And after a while, people are exhausted with change, etc. And any kind of antibodies inside an organisation are reinforcing a couple of things - antibodies exist inside organisations, they're often not at the junior levels. The biggest resistance I find,*

specifically to digital transformation is at the most senior levels of the organisation senior management, and upper to senior upper middle to senior management, the lower managers, the middle and lower levels of the organisation, are open to digital transformation. And the reason they're open to it is that typically means an improvement in the career capital, they're going to work for an organisation that's got relevance that's modern, that's dynamic, etc. And if they work for that organisation, that's going to be positive. The resistance comes in, as I mentioned, at the senior levels for a variety of reasons. But I think many instances, the fluency levels are too low inside, digital fluency levels inside organisations are too low. So even though people know, they've got to do things, they don't understand the principles and the philosophies around doing those things. So digital transformation is important but they actually don't know what it actually means.

5.6.2.4.3. Discussion of the key theme barriers of digital transformation

When it comes to understanding and the gaps identified, both T organisations agree that more work needs to be done to formalise the process of digital transformation to enable the employees. Although T1 has indicated in the previous theme that they have formal education available to the staff, there needs to be more done around digital and the digital economy. T2 have relied on experts to come and educate and there is no formal education around digitisation. Both T organisations have identified an intrinsic need from within to learn more about what is going on and improve on their current knowledge. This is something that they need to do, whereas we saw in the previous theme E organisations have this ability already – they are intrinsically driven to know more and are not reliant on formal education.

Resistance to change as highlighted by T organisations is from a technical capability of doing things and where the current employees are not able to do the task needed, new talent or experts are brought onboard to get the process going. T1 reports on industry adoption of certain products being slow on the uptake, this could be due to the first mover positioning that T1 has established in the industry. The LM participants report on issues of learning new technologies as a barrier for them or the organisation. T2 makes a statement about resistance coming from individuals who have been in the industry for a long time having the most resistance to change, here he states that leadership must get involved to ensure that change happens.

A similarity that has come up across the T organisations is the topic of job relevance. People need to buy into the new way of doing things and get onboard. Automation has changed the employee structure within T1 and has allowed people to upskill into other roles within the business where possible, and where new talent is needed for the change, this has been done.

T2TM1 makes it clear that the digital influence has not really impacted the organisation as yet for people to really take note of where they are positioned for the future, he believes they will once they are aware that their jobs may be vulnerable due to automation.

In light of what has been reported from the two OOH category organisations, Pro1 has reported on some clear guidelines for being aware of implementing digital transformation. Firstly, the change needs to be swift and deliberate to ensure success and not exhaust the process. The T organisations need to ensure this especially with the scale of the business and the number of departments with which they need to consult. The E organisations are small enough to be incredibly agile and flexible to the change. Secondly, ensure what the transition is – is it digital transformation or is it innovation? This will allow the organisation to understand if they need to upskill or recruit, therefore preparing for any resistance which is likely to happen. And lastly, Pro1 explains that resistance often comes from the higher levels of the organisation due to low digital fluency and career positioning of the seniority levels. The leaders of the organisations need to ensure that they know exactly what digital transformation is to position themselves and lead the company to success in the digital economy.

5.6.2.4.4. Conclusion of the key theme barriers of digital transformation

Lack of understanding and resistance has been highlighted throughout this theme for mainly the T organisations, and this is due in part to the legacy of being an incumbent traditional firm that is older than 20 years. These organisations have transitioned immensely over the past decade and are aware of challenges that need to be addressed to ensure future relevance of the organisation. The E organisations, as built on digital are focused on growing – being small in scale, adapting and changing is relatively a simple process for them. As mentioned in a previous theme, they usually copy what the larger organisations do. They therefore monitor and accept the changes of the industry with minimal disruption to their core business which is built on digital.

5.6.3.   Results – Findings for Research Question 3

What is the success from change management and digital transformation capabilities that OOH companies have tried to apply?

This question which was first presented in Chapter 3 looks at the OOH organisations successes of implementing digital transformation in the company through products; processes and people. Within this question are highlights of the success of DOOH; the integration of pDOOH and the road ahead for OOH in South Africa with regards to the people and the products for a hybrid business model. Table 22 below shows an overview of the results for this research question and is discussed further in detail.

Table 22: Digital transformation successes through change management
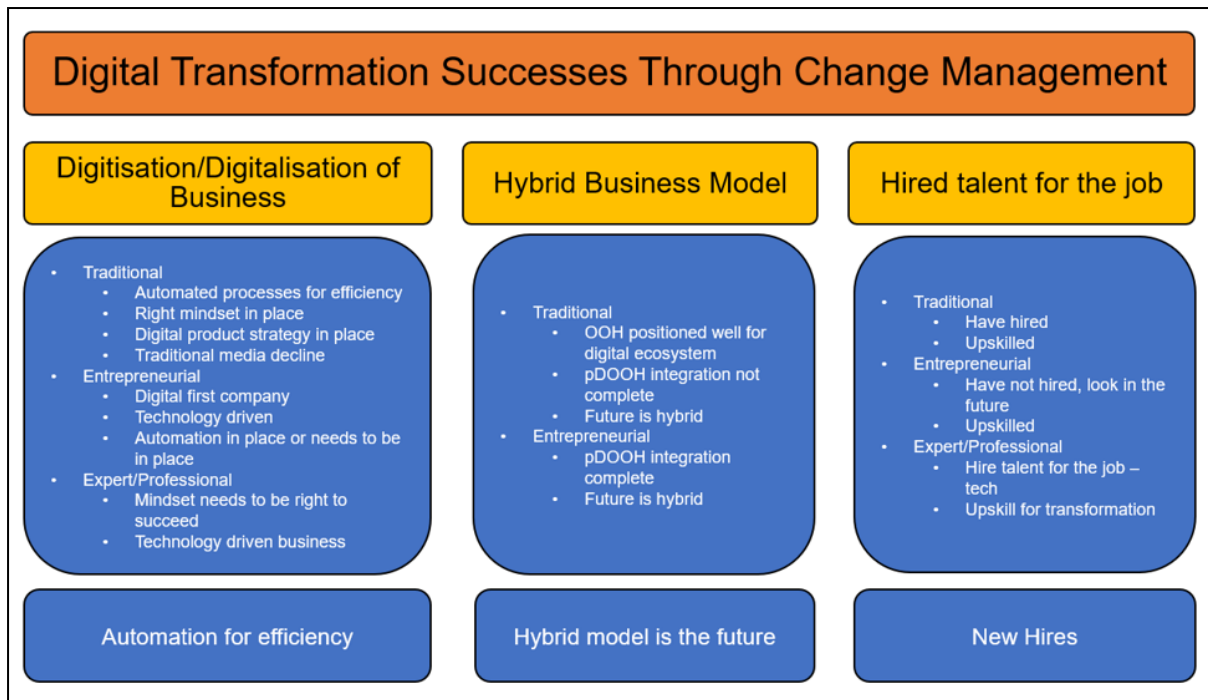
Source: Author's own

5.6.3.1. Research Question 3 – Theme 1: Digitisation/Digitalisation of business

5.6.3.1.1. Theme summary for digitisation/digitalisation of business

Successes of digital transformation brought about by change management from the organisations are identifiable in the automation efficiencies the business has enabled through products; processes and people. The DOOH product itself is a success for the organisations and the mindset of the employees to progress into the digital ecosystem is a pivotal success for the future.

The Harvey's ball matrix below gives a summary of the key findings of this theme.

Table 23: Digitisation/Digitalisation of business

5.6.3.1.2. Key findings for theme digitisation/digitalisation of business

The T organisations have been driving automation of processes for a while to ensure efficiencies and speed. The T1 organisation has placed automation throughout the entire company where T2 still needs to drive this process in a few divisions but is a work in progress.

T1TM1 reported that:

> *But we sort of have been pushing it with, with, especially internal processes which lead to sort of like trying to just do it better, quicker, faster kind of thing.*

> *So, but it's not really labelled digital transformation. But each department is certainly adopting technologies that make the performance of the ultimate responsibilities and tasks easier and more efficient. So, everyone, everyone is doing that in some form or other.*

T1TM2 recalls how the entire business system had to change when DOOH was introduced and the changes that had to be made, which did take time but were successful in the end:

> *Because our systems weren't designed for it. So, everything, everything had to evolve, with the thinking and the thinking, the change in thinking as we were changing the way we solve certain media elements.*

> *We look for ways of improving every process, we've got our own internal system (name of internal system), and we had a session with all the staff about 18 months ago to go through every level of what work was getting done, because there was a huge amount of duplication in efforts.*

> *And we don't have to do that, you know, we've got a phenomenal system that dynamically changes as and when we need it to change, you know, and that could be automation. It could be anything implementation, it could be just as simple as, you know, different reporting that you want. That works for us. And I think that's quite amazing.*

T1TM2 states that he believes advancements will continue:

> *But still, we're going to see more digital permeating into places, which didn't exist in the past, as technology become cheaper. So, I think as more digital comes into play, in professional pricing, there's gonna be pressure on delivery, it's going to be definitely cheaper.*

T1LM2 confirms the above by reporting that:

So, there's obviously our systems, our digital inventory system, our booking system is almost fully automated now. So, there's a lot less paperwork going around. So, which is pretty cool for me, because it's already completed for me. But it's also made it easier for us to be able to track things to find things. If you're running a campaign now you don't even have to find people, you can actually just look on the system and go is my advert running. We've got remote cameras on our billboards. So, if at any given time, you can log into a remote system to be able to see what's been, what's out there, which I think is the most amazing thing about our internal processes.

T2LM1 reported that:

And so, with COVID I think you need to try and digitise as much as possible, our business is quite digitised, which is quite nice. That is our HR processes, ties to certain extent, our financial system is digitised, we've got another inventory system that's digitised they should be the same system they not it's a problem, we have to replicate things. So that creates a bit of a delay on the system from a process point of view.

T1LM2 reported that more automation is on the horizon:

Definitely, I mean, if you look at the game, you know, I always like to look at industries outside of where we operate. And the big drive of automation, the deep drive for making things simpler, easier, with less human intervention, to hear there is no need for, you know, to what extent the automation is needed, that's maybe a question, I would say that, it will be eventually everything will be automated.

However, T2 has had massive digital expansion across a number of its divisions positioning it strongly within the landscape and have been focusing on the product positioning within its markets.

T2TM1 reported that:

The way we structured we've got a digital vision. So, you know, a specialist, and you know, you must understand digital as well there's a lot of components. So, there's the hardware software management side of it, there's the reporting side of it. And then obviously there is the transacting and selling side. You know, when we, the biggest operator of digital play space network probably in X, there is also a content site we manage.

The E organisations are on separate positions of the spectrum with internal processes being automated.

E1TM1 reported that:

> *We do not have a legacy system. I think all the processes and all the necessary systems are in place to ensure that we're doing the best. And we can deliver on what we say. For us, it was because we could do it from day one. So, we really identified platforms that we wanted to work on. So, you know, from for banking, to imagery management, to everything's all integrated digitally. And that's was just, that's what you can do when you have (number of billboards). That's the difference.*

E2TM2 reported that:

> *We, we've kind of done it manually, but we are, we are looking at a company to come up with almost designing an inventory management system from scratch, but it's just, it's just taking up too much time, too much of my time, and I was starting to drop balls on the development side so we put that on hold. But I still think we will need to get to the point where we can manage it a bit better.*

E2LM1 reported that:

> *I think it will eventually get to a point where it is heavily geared towards automation in and that'll be like processes and software and technology, internally, both on the media side, and agency side and client side.*

The experts/professionals gave some suggestions when it comes to digitisation of a business:

Pro1 reported that:

> *So, what you do is you create a roadmap, slice it into what are called phases with milestones, and then split into what we call hard changes or soft changes.*

Pro2 reported that:

> *And that's why important that it's important that if you do bring about a significant change inside the business, be swift, be deliberate, you know, organisations that are soft, in trying to bring about change management, all they do is they exhaust the business.*

The T organisations have a digital product strategy in place for expansion, as do the E organisations who were built on being digital first companies. The T organisations had to ensure there was emphasis on employees having the right mind set that was cascaded down from the leadership to ensure relevance in the future for the T organisations. The E organisations are technology driven but they also ensure a key focus on the right attitude for adoption of new products etc.

T1TM1 reported that:

And so I think it's really about having the mindset of adapting and seeing and reacting, you can't I mean, I think, you know, from a digital tech point of view, you know, the big, big tech companies in the world will probably know what's going to be delivered in 10 years' time, but I think the average business doesn't - so I think with the right mindset to deal with it when it arises, and then to have the mindset to be prepared to partake in it, as opposed to, you know, to sit there say, oh, my goodness, I don't want it to happen kind of thing, you can't stop that - it's going to happen, either get on with it or you don't do that. And so, but certainly, certainly, we specifically probably weren't that ready. But our minds were open to it. I think that's probably as ready as we could have been.

T2TM1 as reported earlier stated:

Then ask questions and being inquisitive. And I think also surround yourself with people that understand the space.

T2TM3 reported that:

You've got to be able to embrace technology, very quickly. You know, I think that in the sales environment, you've got to, you've got to have an open mind, and you've got to continuously look for the opportunities and where they live.

Pro2 states that the mindset must be right within the leadership for it to filter down to the rest of the organisation:

How do we need to think differently as leaders, as business owners, as functional leaders, etc. So, one of the things that I mentioned earlier is that, a vulture mindset, you know, doesn't work if you try to digitally transform a business, because there's a good chance that you don't have those capabilities inside of the business, right? So, you need to change that mindset. And changing the mindset at the senior levels, I think it can be complex. If you go back a few steps, if you want to bring about change inside the organization's methodologies and approaches, you announce that change: why there's a change? Where change is going to happen: train people up: monitor the change; implement the change, etc. In a digital transformation environment, I think part of the driving adoption of change is making sure that the stuff you deploy is intuitive, right? So, you don't have to beat people to use it, there is a very clear value proposition as to why they should do something. Product digitisation has been successful for the T organisations who were built on traditional/static OOH in comparison to the E organisations who are digital first.

T1TM1 reported that:

And we have moved towards getting about 30% of our revenues, from sources of digital out of home compared to traditional, that's up from about 7% or 8%, about six or seven years ago.

And just where we have innovated in the last period of time in recent years, it's been in the digital space. So, we built digital products back in the late 2007 and 2008, the first company to have various digital out of home products. And they also more recent first to market with dynamic out of home, which is really some form of either the cameras, recognition, that kind of stuff.

T2LM1 reported that:

Come, let's see if we can make this work. And five years later, we've incubated the business. And we haven't looked back with a very, very successful launch of digital in the environment.

5.6.3.1.3. Discussion of the key theme digitisation/digitalisation of business

The T organisations have had to, with their legacy systems and products completely transform the way they run their businesses and sell their products in comparison to when they started over 20 years ago. The T1 organisation has successfully implemented automation throughout most of the organisation to ensure efficiencies in delivery of service across the organisation. They are aware and open to more technological advancements that they believe are on the horizon and have established a strong mindset within the company to embrace and adopt the changes that will come. The T2 organisation has also successfully automated a number of its processes through consultation and communication with the organisation. There are however minor gaps that need to be automated, but the focus has been on the delivery of a large scale of DOOH products over the past few years. Both T organisations have shown resilience with the right mindset to adapt to the challenges presented by the digital economy and advancements in technology have allowed for the relevance of the business in the future.

For the E organisations, built on digital and technological as a driving force of strategy – the automation of the businesses is completely different. E1 is fully automated and E2 is still trying to automate a number of processes including inventory management. However, the scale in comparison to the T organisations is considerably different and easier to manage, but the implementation should drive more efficiencies. It is clear that E2 is very focused on the growth and development of its products, and will then tackle the automation process. Both E organisations have successful digitised products and are looking forward to further advancements in the future.

5.6.3.1.4. Conclusion of the key theme digitisation/digitalisation of business

From the above findings it is evident that the T organisations have successfully implemented digital transformation into products, processes and its people through change management capabilities outlined in previous themes in the research report. The T organisations have had to fight for survival and have shown resilience and bravery through investing in digital transformation.

The E organisations as entrepreneurial firms have learnt from the T organisations and have monitored the landscape as to what will work and make the business successful. Being built on a digital strategy they did not have to transform or adopt legacy systems or paradigms that would have caused challenges like the ones which T organisations would have been faced with. However, it is important to both E organisations that they remain relevant and produce growth for the organisation.

5.6.3.2. Research Question 3 – Theme 2: Hybrid business model

5.6.3.2.1. Theme Summary for hybrid business model

Looking at the successes and a way forward of digitisation of the OOH organisations as reported above, the OOH organisations have had to radically position DOOH into the digital ecosystem through the implementation of pDOOH which uses software for the automation of buying and selling DOOH through impression-based ads. Launched in South Africa in 2020, the OOH organisations have all immersed themselves into the process of automation of selling and buying with 3 of the organisations having successfully launched pDOOH as an offering to the market and the remaining organisations launch is imminent. Through the process of this digital transformation there have been challenges along the way in terms of understanding and adoption both internally and externally, however the organisations are determined for the success of this adjacent business to the core to ensure competitive placement of OOH in the digital ecosystem.

The Harvey's ball matrix below gives a summary of the key findings of this theme.

Table 24: Hybrid business model

THEME	Traditional OOH	Entrepreneurial OOH	Collective Feedback
Hybrid Business Model			

Legend:

 Hybrid Business Model for E1 and E2

 Hybrid Business Model for T1 and T2 imminent

Source: Author's own

5.6.3.2.2. Key findings for theme hybrid business model

T1TM1 reported that:

I didn't have any idea what programmatic buying was 10 years ago.

T1TM2 reported the relevance of pDOOH:

So, through, through the programmatic, we've been able to align ourselves a little bit closer to what is happening in the social and mobile environment. When I say align, that's really what it is. Because we're not the same thing. But we are able to tap into those sorts of markets, which is a good thing for us, because that's where, arguably 40% of all ad spend cash ends up.

But I think there's going to be more growth for programmatic. And I don't think it'll ever replace the money that we're used to getting with (traditional) digital. But it'll certainly help us compete a little bit better.

T2TM1 reported that pDOOH is part of the plan for the organisation to launch:

So, we've recently added quite an expert presence to the entire business, about programmatic, you know, coming out of the digital world. So, we upskilling the entire organisation, you know, as part of the future. So, there's a senior cross functional team, but we, we don't want to rush into this, and we don't want to be associated with some of the activity or conduct that's currently taking place. So, when we go in, we'll go in properly. You know, also the commercials need to make sense.

So, it's still a long road, but I think next year, probably middle of next year, we'll be in a position to, to activate, probably drive this segment.

E1 from start-up had pDOOH as an offering for advertisers, with E1TM2 reporting that:

You know fortunately for our squad, yeah, (company name) the guys are pretty much ingrained in the out of home space. (leader) has been talking about programmatic out of home, for the better half of two years, our business has been programmatic, really, from onset, we knew being a digital first business is part and parcel of being, you know, programmatic forward, due to the uptake, and obviously what we're seeing globally. And therefore, as far as change goes, we've essentially really been at the forefront. So, I can only imagine in a much bigger organisation with a lot more heritage, that kind of conversation might be a bit different. But for us, we've entered on the front foot.

E1TM1 reported that:

The beauty about OOH is that we are, we are the physical extension of the digital world, we really exist in real places where real people are.

E2 has launched pDOOH in the past 8 months:

E2TM1 reported that:

I mean, absolutely. I mean, we, we've always been saying, it's, it's coming programmatic is coming, programmatic is coming. But we, we probably, we probably started a bit, a bit late, to be honest. But, you know, I think, again, we were we were trying to start a brand-new company. So, there was a lot going on. So yes, we might have lost that a little bit. But I think I think it will catch up. And what's nice now is, every single one of our screens is setup on board, and it's working.

E2 reports on some concerns that are reiterated about pDOOH from E1.

E2TM1 reported the following:

I'm a bit worried about programmatic. If I'm honest, I think (other media owner) would know the potential of selling the traditional sort of slot system that we have at a rate is good. You know, and it is a, for me, it's quite important. And my concerns around the programmatic is just the, what it's made for the ability for clients to, to get far more reach with far less spend, and they book(buy) things a lot clearer. Look, it's lovely to have an income generating thing while you're sleeping. But it's small, you know. And I do worry that as more and more agencies adopt it, I do worry that we might see like the overall spend actually drop because they're using it from far more cleverly.

E1TM1 reported that:

I think it will develop over time, I'm not overly excited, over programmatic and things like that, but only because I need to see where the benefit is, I can see benefits for some people, I can't see benefits for all people.

The ability to get information and see a tracking line and my impressions, I love it. That's awesome. But the loss of control as a media owner to privacy control over my inventory, and that initial negotiation and discussion with clients is a big problem is it's not the end of the world, but it's problematic.

There have been some adoption and implementation challenges of pDOOH for 2 of the organisations that have launched pDOOH as an adjacent product to the core model, and the following was reported:

E2TM2 reported that:

I mean to be honest; I don't know if (media owner) might be the same? I don't think people fully grasp this, really, I don't think so and I think we learned that a couple of people have - so that's my role here I look after all the digital stuff and I think in time now there's actually a role for someone to come on board and to take ownership of it so at the moment I don't think they've learned it. So, I don't think they've embraced as well as they should have. But again, it's only been eight months.

T1LM2 reported that:

So honestly still, I'm trying to come to grips with half of this programmatic stuff. I'm probably because my brain doesn't understand it that well. And even, and even after being trained on it a few times, I still, every now and again, have to turn around and go, okay, please explain because I really don't understand what's going on, you know, I'm getting there slowly. But you're with your DSPs, and your SSPs. And all that type of stuff. It is, it can sometimes get confusing. In fact, we running a campaign now. And the guys ask questions, and are just like, look at it another way, they don't understand what you're talking about. Yeah, no, it's not. I suppose, from my point of view, I could probably educate myself more,

When asked about OOH organisations remaining a hybrid business model in the near future or if it will become fully platform-based, the participants in different organisations reported the following:

T1TM1 reported that:

> *It will be a hybrid platform for quite some time. And then you will probably find over time it will shape or the hybrid will change to a more automated, bigger percentage of the company will come from automated.*

T1TM2 reported that:

> *Absolutely (platform based). Well, yeah, you know, I think if we carry on the way we're going now, we're just going to get further squeezed, you know, you're just going to further marginalised by the agencies who have their own economic constraints and dynamics that they are working on within their businesses. I think if you can widen this to people that haven't thought about advertising. It's all about volume and numbers.*

T1LM2 reported that:

> *I think it will be hybrid is in terms of the buying through platforms, and that type of thing, there's definitely a place for it. But they are also media buyers, brand managers, all of those, those guys that work in the out of home space as a strategist, they will still need the advice of a normal person or a salesperson to be able to get what they want out there. I don't think it'll ever be totally platform-based.*

T2TM1 reported that:

> *I think it will remain a hybrid model for the foreseeable future. If I say foreseeable future, probably in the next few years. I don't think humans will be out of the process. I think there still will be human intervention.*

T2LM1 reported that:

> *So, I honestly believe at some point, it'll probably take you to the platform. But I think you're going to find those clients that are going to want the contract. They're going to see the contract, read the contract, it's, it's like why do we buy newspapers? We want to touch it.*

E1TM2 reported that:

> *You know, they're still selling in a in a dual process overseas. And I don't see that going away anytime soon. Yeah, specifically, I think there'll be some stuff. But I think, for the most part, a lot of it will just be done through human interaction and selling the way we have done traditionally. And that, for me, that standpoint goes without saying, across multiple industries in a sales perspective, I don't think you can completely replace a human or automate a sale.*

E2TM1 reported that:

I don't think it will never be a fully automated model, there will always be percentage available for the traditional battle.

E2LM1 reported that:

But also, I don't think programmatic is going to dominate fully, you know, what I mean? There's always going to be that human, humans are going to buy from humans, and there's going to always going to be that feeling involved, you know?

5.6.3.2.3. Discussion of the key theme hybrid business model

Out of the 4 OOH organisations, 3 have successfully launched pDOOH into the South African market. The outstanding T2 organisation is preparing to launch and has monitored what the industry has done, also ensuring that it makes commercial sense for the business. In comparison T1 were the first to market with pDOOH in South Africa and the E organisations as discussed in the themes above monitor what the traditional incumbent firms will do then follow suit. E1's business was programmatic from start-up, whereas E2 launched pDOOH 8 months ago at the time of the research project.

It has been established that DOOH has positioned itself well into the digital ecosystem and programmatic was the obvious next step for the organisations to embark on for relevance in the digital economy. The integration of pDOOH was a challenge for all 3 organisations and still is a challenge for all of the participants that have not been exposed to digital online media. The 3 organisations that have launched have entered the market and are learning the processes daily. The T2 organisation is taking its time with due diligence and learning in the platform-based way of selling DOOH.

The T organisations are excited for the future of pDOOH in how it allows OOH to penetrate the digital media ecosystem by offering impressions to advertisers that have never bought OOH before, thus ensuring growth for the organisations through new business. The E organisations in comparison are sceptical as it may lead to loss of control of their assets and decline in revenues due to the way advertisers buy pDOOH. However, they do see the benefit of pDOOH but believe consideration and execution from the salesforce of the organisation is key.

When asked about the future of OOH and whether it would be fully platform-based or remain a hybrid business model, the unanimous answer was hybrid – however the underlying reason was that humans need to be involved. Platform-based buying and selling does not mean there are no humans involved, the pitch still needs to be done – pDOOH just allows for the efficiency and speed that is required in the digital ecosystem. T1 had the strongest belief that automation and platform-based selling will be the future of OOH, with a hybrid model for some time still.

The other 3 organisations believe that automation will have a high percentage in the future but will not dominate.

5.6.3.2.4. Conclusion of the key theme Hybrid business model

A hybrid business model will be part of the OOH organisations way of doing business for now and for the foreseeable future. The organisations have established the benefits of having a hybrid business model that allows for growth, speed and efficiency, and the opportunity to compete with digital media. The E organisations have concerns regarding the control of their assets and this can be understood in relation to the size of their holdings in comparison to the T organisations that have other revenue streams through traditional/static media. Automation and platform-based selling of OOH is definitely going to play a pivotal role in the future of OOH and will continue to grow as we have seen on a global level. The human or workforce intervention is a definite concern that arose, but the digital transformation of these employees is important now and in the future for job relevance.

5.6.3.3. Research Question 3 – Theme 3: Hired talent for the job

5.6.3.3.1. Theme summary for hired talent for the job

This theme briefly allows the researcher to understand if specialised talent were hired to assist the organisations through the digital transformation successes over the years and including the implementation and integration of pDOOH or platform-based selling into the market. The experts/professionals also give some insight as to what the best approach is, to hire or to upskill.

The Harvey's ball matrix below gives a summary of the key findings of this theme.

Table 25: Hired talent for the job

THEME	Traditional OOH	Entrepreneurial OOH	Expert/Professional	Collective Feedback
Hired talent for the Job	●	◐	●	◕

Legend:
● Hired talent for digital transformation
◐ Talent in place but more to be hired in the future

Source: Author's own

5.6.3.3.2. Key findings for theme hired talent for the job

T1TM1 reported that:

So, it wasn't just, you know, one person's decision and then it was also around resourcing correctly. So, it was it was believing in it and then putting the resources especially if, taken the dynamic digital space in the last couple of years, we've got some very, very good employees that work in that area for us, and they are expensive and then you know, you've got to put your money where your mouth is and they have the competence to start bringing you all the things that are happening out there.

So, if you take the operational side of the business, we've got a lot of technical capability now that we didn't have 10 years ago - not one person, 10 years, we probably got 20 now.

So, you have all that, all that talent. And really - it's been, it was never a big bang thing. It was slowly, we did this, we did that. And it has become more and more widespread throughout the business.

T1LM1 reported that:

The guys that actually are making things work, have all been hired and from the right place, because they know what they're doing. And they're very good at what they do. So yeah, I think in one of (CEO) strategies, I think is people from the top drawer and I think from that end, he's definitely got that right.

But it's nice that whenever I'm with clients, or whether with other people talking about it, there's always at least two other people that know more than you that can fill in the gaps that I don't know.

For the T2 organisation, they are undergoing some changes that have required new talent but LM1 reported that there is a need for technology experts.

T2LM1 reported that:

I really do, I think we could be a lot better at what we doing. Let's just focus really, and get things like Chief Information Officers, and that, you know, you need to start bringing those people into the business that can understand that component and run it properly. We undergoing a big movement and change in our marketing team.

The E organisations have hired their current talent from start-up and have upskilled where necessary.

E1TM2 reported that:

And as we grow, that's definitely going to be part and parcel of, you know, developing people hiring the right folk, and ultimately, essentially, making sure that they're

equipped to be the best in the marketplace, whether that is providing solutions, and ultimately knowing how consumers are gonna want to buy or how they're gonna want to essentially do or conduct business and we all need to ensure that whomever we bring on board or is included, that we are well equipped and prepared for it. Okay.

For pDOOH E1TM1 responded with:

That's why we need to, we need to make a plan there. So, we actually haven't done it to be honest, but it's a huge focus for us. And I think the solution is a dedicated resource to be honest.

E2TM1 reported that:

I mean, upskill into the max, but we are probably going employ specialists, that will be the, that'll be the goal. So again, you want everyone to be as good as they can and at what they can do.

The OOH organisations have mainly hired or are looking to hire specialist skills for the advancements that they require with regards to digitisation and automation. The experts/professionals highlighted some key learnings of hiring new skills or upskilling.

Pro1 reported that:

So, we've seen stuff before where you want to do multi skilling approach, you want to bring processes together, and suddenly just discovered, but those people that you've got, they, they are not qualified. They're also not trainable, they just don't have the capacity to deal with something new. What do you do? (You) are going to bring in a new team to get the new business going and keep this old one separate for now.

Pro2 reported that:

Whereas I think if the philosophies if you transition your workforce properly, then then a bulk of the workforce would be able to move across. So that is certainly my view. And then the other thing is that if you transition, if you digitally transform your company, against the right business model, you're doing it to unlock additional value inside the business. That means that you do expand the footprint of the company.

So, this is fear that if you transform a company, that you lose jobs, but the reality is if you transforming a company for the right reason, the company should expand and grow. So ultimately, the company has more units that it needs in it does certain jobs, that will be irrelevant. And those jobs typically have negative attributes of low

productivity levels, low efficiency levels, error rates, safety, etc. Those jobs are going to be lost, they just get lost quicker. So that's on the digital transformation side.

If you on the innovation side of the business, and you're wanting to move the businesses into a new adjacency so something that is not core to the business. So, let's say you're a retailer and you want to move into banking or you're an energy company you want to move into water, it's, it's quite possible that you don't have these deep technical skills to move into that new environment.

So, it's quite possible that to you, at the beginning, you'll need a blend of external skills to kickstart an innovation process. So, in that instance, hire an organisation or hire the right professionals to come into the business with the technical skills, or what happens, what we see a lot at the moment is an organisation will acquire another organisation and bring them into the fold, and then become a stepping stone into this new environment.

5.6.3.3.3. Discussion of the key theme hired talent for the job

T1 organisation is clear in their decision to hire new skill or talent for technologically advanced processes or products that are new and require a skill that unfortunately is not currently within the business. What we have learnt from T1 is that the talent that is hired has a functional role to play such as a technological expert within the business. Other talent is hired for product development and processing, and then they assist the legacy employees in upskilling their knowledge of the new product through communication and engagement. This is very much aligned to what Pro2 had to say with regards to hiring talent for innovation, where digital transformation transitions the workforce. Pro1 reiterates this with acknowledging if the workforce actually has the capability to do the new job required. T2 have not hired any new talent for newly formed projects or products and have upskilled their employees through internal processes, an expert has come in to assist the programmatic process but they want to achieve more by hiring new talent that is right for their positioning in the future.

In comparison, the E organisations have not looked into acquiring new talent for their organisations and are going through the processes of digitally transforming on the hybrid business model. Both organisations have stated that they will need a talented, dedicated workforce for programmatic that will be hired in the future. Although both organisations are built off digital strategies, pDOOH is a very new product not only locally in South Africa but also on a global level.

5.6.3.3.4. Conclusion of the key theme Hired talent for the job

Hiring new talent for new products or processes is the favoured approach by the T organisations, whereas the E organisations are working through the processes internally though digital transformation. The difference here is that the T organisations have a legacy of different media formats with a salesforce and operations force that is aligned to traditional formats and ways of selling, whereas the E organisations are built as digital from scratch. However, the E organisations make it clear that talent is needed in the organisation to run pDOOH, this could be because they see this product as being incredibly relevant in the future and the current workforce may not be able to handle its magnitude.

5.7. Chapter conclusions

Table 26 below represents the key findings reported in Chapter 5 that align to the research questions presented in Chapter 3.

Table 26: Chapter 5 findings alignment to Chapter 3 Research Questions

Research Question	Theme from findings	Traditional OOH	Entrepreneurial OOH	Expert/professional	Collective Feedback
1	Culture is important factor of driving digital transformation	● Supports	● Supports	◐ Nuances	● Supports
1	Digital Transformation drives Business Strategy	● Supports	● Supports	● Supports	● Supports
1	Digital Transformation in Business Strategy	● Supports	◐ Nuances	● Supports	● Supports
1	The Media and OOH media landscape influences digital transformation	● Supports	● Supports	N/A	● Supports
2	Leadership used for change management	● Supports	● Supports	● Supports	● Supports
2	Implementation of digital strategy and digital transformation strategy	◐ Nuances	◐ Nuances	● Supports	◐ Nuances
2	Enablers of Digital Transformation	◐ Nuances	◐ Nuances	● Supports	◐ Nuances
2	Barriers of Digital Transformation	◐ Nuances	◐ Nuances	◐ Nuances	◐ Nuances
3	Successful digitisation/digitalisation of business	● Supports	◐ Nuances	● Supports	◐ Nuances
3	Hybrid Business Model	◐ Nuances	● Supports	N/A	◐ Nuances
3	Hired Talent for the job	● Supports	◐ Nuances	● Supports	◐ Nuances

Legend:

● Supports theme

◐ Nuances of support of theme

○ Does not support theme

Source: Author's Own

CHAPTER 6: DISCUSSION OF THE FINDINGS

6.1.   Introduction

This chapter discusses the research findings reported in Chapter 5. The data in Chapter 5 was gathered through the virtual meeting room software, Microsoft Teams, through the research methodology described in Chapter 4, aligned to the research questions presented in Chapter 3. A comparative analysis of similarities and differences was conducted in this chapter between the themes highlighted from Chapter 5 and the literature from Chapter 2 where applicable.

Each theme that was collected in Chapter 5 from the research questions presented in Chapter 3 is linked to a theoretical category from Chapter 2, these are analysed and discussed below. Each theme analysed has a conclusion in relation to the key findings discussed. This is repeated for each theme and then the conclusion for the research question provides a summary of the research question presented.

Additional literature was included into Chapter 2 after the data collection was concluded to ensure the latest literature was available for this research project.

6.2.   Discussion - Research Question 1

How are OOH companies approaching digital transformation?

Research Question 1 identified how the 4 OOH organisations are approaching digital transformation within their firms. This research question acknowledges what the driving forces are behind an OOH organisations business strategy and how the organisations are positioned to be competitive within the digital ecosystem. This research question was positioned to get substantive evidence as to how OOH organisations operate. From the literature the main themes that are aligned to this research question are: the media industry; the OOH media industry; digital transformation and strategic leadership. The researcher will discuss this research question based on the themes that were identified from the analysis conducted on the results. The following Table 27, indicates the 4 themes from Chapter 5 that will be used for Research Question 1.

Table 27: Summary of themes from Chapter 5 for Research Question 1

Summary Table		Category of Participants			Collective Feedback
Research Question	**Theme**	**Traditional OOH**	**Entrepreneurial OOH**	**Expert/professional**	
1	Culture is important factor of driving digital transformation	⬤	⬤	◑	⬤
1	Digital Transformation drives Business Strategy	⬤	⬤	⬤	⬤
1	Digital Transformation in Business Strategy	⬤	◐	⬤	⬤
1	The Media and OOH media landscape influences digital transformation	⬤	⬤	N/A	⬤

Legend:

⬤ Category supports the theme as an approach or response to digital transformation

◐ Category divided the theme as an approach or response to digital transformation

Source: Author's own

6.2.1. Findings: Culture

The question of culture was asked by the researcher to identify if the organisations have an environment that breeds innovation and has adopted some form of digital transformation over its tenure in the OOH media industry. As noted in the literature review, "due to the recent digital technology revolution and advent of big data, advertising has transformed in fundamental ways, demanding completely new conceptualisations of what 'advertising' is and what constitutes the 'advertising industry'" (Helberger, Huh, Milne, Strycharz, & Sundaram, 2020, p. 378). With this being said, it was important to establish how the organisations adapted to the change in the media landscape, most especially the T organisations who have had to deal with legacy models and strategies. In addition to this, with a focus on OOH, Taylor highlights that "the advent of the digital billboard has clearly revolutionised the out-of-home industry" as it has "come into being at a time when many cities around the world are experiencing transformation and growth" (Taylor, 2015, p. 178). All the organisations interviewed believe that culture plays an important role for driving digital transformation, however the experts/professionals believe that culture is not a major factor for driving digital transformation.

The T organisations are powered by a culture that is of high performance and delivery in the industry, it's almost expected of them to always be at the top. T1 is driven by accountability on 5 pillars to deliver a strategy based on a number of values that they follow ensuring that they are "doing it right the first time". While T2 is in the process of restructuring its approach to culture across the company, T2TM2 reported that innovation is "probably the backbone on which you are competitive within the category". A differentiator between the two organisations is that T1 is people centric and family orientated, whereas for T2 this was not a key positioning that transpired through the interview process. In light of this, T2 is currently undergoing a restructure of culture. Like the T organisations, the E organisations are driven by a high-

performance and an accountability culture in achieving the targets set out but are flexible to market changes due to their digital first strategy. The individual and the leadership is of high importance to the E organisations but their focus is on driving sales based on their digital strategy which has been set since from start-up. Faced with the challenge of survival within the media landscape as digital media continues to take market share, the T organisations are ensuring they do not end up in the same trap as the newspaper industry by constantly striving for new and competitive ways to ensure relevance in the marketplace. The E organisations who do not have legacy concerns of traditional media are focused on sales.

When reviewing the above, the organisations are inherently driven to succeed and culture does play a very big part in this for them. The experts/professionals argue that culture is not a driving force of change management for digital transformation; however, there needs to be the desire for change to ensure relevance and growth – which ultimately comes from the high-performance culture and the ability to be flexible. Literature from Gokalp & Martinez argues that "workforce management" must be in place before transformation occurs and this dimension includes: HR skills development; organisational structure management; sustainable learning management and organisational change management (Gokalp & Martinez, 2021, p. 8). In addition, from the literature, it is argued that it is important to implement "a digital culture during a digital transformation" of a firm at the onset of strategy based on the following factors: "by ignoring culture, an organisation risks transformation failure; a digital culture empowers people to deliver results faster and a digital culture attracts talent" (Ahern, Danoesastro, Hemerling, Stutts, & Kilmann, 2018).

In accordance with the above, the literature on digital transformation aligns to what the OOH organisations have implied about culture. Solberg et al. (2020) states that, "the push toward digital transformation is motivated by the belief that new technologies have great potential to drive innovation and competitive advantage", whereby aligning to the T organisations drive of being competitive and driving new ways of doing things (Solberg, Traavik, & Wong, 2020, p. 106). Wrede et al. (2020) also identifies similarities of having a need to survive by utilising digital transformation to drive new technologies; customer satisfaction; competition and innovation. Institutional logic can be a barrier for the incumbent organisations as "institutional logics are the rules of the game that constrain and shape the behavior of institutional actors and define the criteria for efficiency and effectiveness of institutions" however, the T organisations that have been interviewed in this research are aware of what needs to be done to survive and are competitively driven for high performance and success (Shekhar, Manoharan, & Rakshit, 2020, p. 62). The E organisations are not faced with the issue of legacy impediments that would come from institutional logic. With digital transformation mainly being focused on products and processes, Bonnet et al. (2014), Vial (2019) and Hess et al. (2016)

refer to cultural and structural changes as these are important to prevent the challenges of a successful transformation.

It is established from the literature, and from the research conducted that an organisation must have an inherent desire to succeed and survive in order to be competitive through digital transformation or alternatively, the culture must change. The step towards digital transformation must be built from within the characteristics of the organisation. If the OOH organisations were not built on competitiveness; high-performance; innovation and accountability – the future of these organisations may be in question due to the advancements of digital technologies. Therefore, this research on the theme of culture being an important factor for digital transformation is an extension to the literature on digital transformation and change management.

6.2.2. Findings: Digital transformation drives business strategy

The question regarding "what drives your business strategy" aligns to identifying what is the main factor that drives the business strategy of an OOH firm. It is established that having a competitive advantage of products; processes and talent is very important for both the T organisations and the E organisations. The three categories interviewed all determined the market as a driving force for business strategy, most particularly the products and processes that are developed through digitisation and digitalisation through the advancements of technology. The organisations are either informed or influenced by what is happening on a global level of OOH. The experts/professionals interviewed added an element of looking inward to the business as well as identifying what the market is communicating.

With the OOH organisations identifying the global OOH influence on strategy, it is important to note how different the organisations will deliver products and innovations into the market. The T1 organisations like to be "first to market"; the T2 organisation prefers to have "second mover advantage" by ensuring it all makes business sense; and the E organisations will watch what the larger or T organisations will do with launching new products or innovations and then choose to follow or not to follow based on commercial alignment and market demand. Due to the fact that these E organisations are so new, they are focusing on growing their business through their digital strategy and as well as not being like everyone else. Pro1 reports that looking out for opportunities will communicate what the organisation must do internally to survive, ask the relevant questions that will guide the business strategy "do you want to grow or expand or build a new business?".

Although the drivers of business strategy have been mainly digitisation and digitalisation for the OOH organisations, these phases lead to digital transformation which requires a development or redesigning of a business model that allows it to compete within the digital

ecosystem for relevance and growth. As conveyed by Hess et al. (2016) digital transformation is concerned with the changes digital technologies can bring about in a company's business model, which result in changed products or organizational structures or in the automation of processes" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 124). The South African OOH market is able to learn from counterparts overseas as there is more often than not a technological lag. This provides the OOH organisations with time to assess the status quo and act on learnings from global leaders. As stated by Burton-Jones et al. (2019), "digital transformation involves fundamentally rethinking an organization's processes, services, and roles from a technology-enabled perspective" (Burton-Jones, Casey, Draheim, & Eden, 2019, p. 1). All OOH organisations concurred that they are able to adapt to the changes that they see on a global level, aligning to the above literature about fundamentally rethinking the business. Bresciani et al. (2020) conveys adaptability as incredibly important for technological advancements, the term "organisational adaptability" refers to an organisations business model changes through the "transfer of technological capabilities" (Bresciani, et al., 2020, p. 74). The adaptability can be viewed either from a short-term perspective for "value maximisation" or through a long-term approach for "innovation performance" (Bresciani, et al., 2020, p. 74). Pro2 reports on "business model flexibility" that allows the organisation to "remain resilient and relevant in this new digital economy".

The onset of pDOOH into the OOH landscape has brought about revolutionary changes to the OOH medium and the business models of the OOH organisations. All OOH organisations at the time of this research have a hybrid business model or are in the process of finalising a hybrid business model. pDOOH has been developed for OOH to be competitive in the digital ecosystem and it is through technologies that this is possible for the OOH organisations, this is in line with the research done by Benlian et al. who have found that "Digital transformation is concerned with the changes digital technologies can bring about in a company's business model, which result in changed products or organizational structures or in the automation of processes." (Benlian, Hess, Matt, & Wiesbock, 2016, p. 124).

The E1 organisation are largely driven by client demand, E1TM1 stated that "because our intention is to give the client what they need for the objectives that they want to achieve" This is similar to the research conducted by Gurbaxani & Dunkle (YEAR?), who found that "digital technologies enable the development of new or enhanced products and services delivered to customers more efficiently". This implies that the customer is of importance during the digital transformation process. In South Africa the trends usually follow what is happening on a global level but it does get localised for the contextual relevance of the market, client demand for new and exciting things is always on the radar. In line with this, Pro2 raised the importance of customer experience being a central factor that is delivered through digital transformation.

For the OOH organisations in South Africa, the drivers of business strategy are reactionary to what is happening in the market around them. Digitisation, digitalisation and digital transformation have been the main drivers of business strategy for all 4 organisations due to the advancements in technologies on a global level as well as competitive digital ecosystem. The literature supports these findings and therefore this research project is in agreement to the current literature on digital transformation.

6.2.3. Findings: Business Strategy

When asked about the OOH organisations strategy, it was evident that there is no clear strategy for digital transformation for all 4 of the organisations. They all have a digital strategy for growth, with the E organisations being built on this but no clear digital transformation strategy is evident. The business strategies for the OOH organisations are focusing on innovation, business relevance and digitalisation – which is related to digital strategy not digital transformation.

Research conducted by Hess et al. (2016) compares the two: digital strategy which encompasses a firm's vision for the future, versus a digital transformation strategy which "guides managers though the transformation process resulting from the integration and use of digital technologies" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 125). Chanias et al. (2019) also established the need for a digital transformation strategy to be implemented into an organisations business model. Larjovuori et al. (2018), emphasise the "importance of a strategic approach to digital transformation" where "managers must be able to challenge how the organisations operate, engage their personnel in the process of redefining their work roles, and keep their minds open to the possibility that their roles will change as well" (Larjovuori, Bordi, & Heikkila-Tammi, 2018).

From the findings of the research and when comparing them to the literature reviewed, it is evident that for the OOH organisations there is a need for a digital transformation strategy to be in place. Unfortunately, this theme of this research does not add to the current literature on digital transformation but places a recommendation for the OOH organisations to implement a clear digital transformation strategy.

6.2.4. Findings: The OOH landscape influences Digital Transformation

The OOH organisations digital transformation is influenced by the media and OOH landscape globally and in South Africa. The biggest influence has come from the onset of digital media advertising. "When the Internet entered our lives, for example, it brought radical changes in the advertising practice and advertising agency business and gave birth to the new subfield of Internet or online advertising, which morphed into interactive advertising, and then morphed

again, now to digital advertising" (Huh & Malthouse, 2020, p. 367). Print, Radio and television have had to transform and now it is time for OOH to make its mark in the digital ecosystem through advanced technologies including pDOOH.

The local OOH landscape is highly competitive with new entrants coming into the market, the E organisations have emerged to compete with the traditional companies but they started with a digital strategy. The move to digitalisation for OOH companies is pivotal for relevance and creating value in the digital economy. Some key findings from the research are as follows:

T1TM1 reported that:

> *And we managed to certainly lead the way to a large extent, five years ago we had far less competition that we've got at the moment, overtime time, what we'll see is you'll see more and more digital and that will just become more and more mainstream.*

T1TM2 reported that:

> *And as the quantum of digital boards increased, it was quite nice when we started as it was really just outside of the norm. And we quickly, we sort of gained control of the market. And I mean, we had phenomenal occupancies, great returns. And as more smaller companies came into the market, it dawned on us that we obviously needed to change.*

E1TM1 reported that:

> *Theoretically we are old faces but a new business, but we win the right to compete in the marketplace, especially given the nature of our product. We've essentially entered the market, obviously, let's call it directly competing against some of the most formidable out of home businesses that have got a lot more heritage, given the size and the nature of our product.*

In addition to this argument, Lee and Cho (2019) argue that "the rapid change in the media landscape owing to 'digitalization' has blurred the boundaries and domains among various advertising media, and this has fuelled a rapid growth in DOOH advertising executions utilizing digital convergence" (Lee & Cho, 2019, p. 97).

The T organisations reflect on the competition that has grown over the past few years in South Africa, with T1TM2 reporting that "and as more smaller companies came into the market, it dawned on us that we obviously needed to change". The E organisations have entered into the market to compete and E1TM1 reported that, "we've essentially entered the market, obviously, let's call it directly competing against some of the most formidable out of home businesses that have got a lot more heritage, given the size and the nature of our product". In

accordance with a study done by Babst et al. (2020), the topic of DOOH has been reviewed from a consumer perspective in South Africa, however the research does not give detail from an OOH media owner perspective on the market apart from revenue generation from Roux et al. (2020). Outdoor Auditors have also given an indication on the increase of DOOH which has increased by 441% over 7 years (Warburg, 2021).

Another interesting topic that was highlighted in this research was the regulation of the OOH industry and how it may create barriers for the OOH organisations. However, all 4 OOH companies are committed to the regulations and believe that they are there for a reason. The problem reported from the research is that other OOH organisations are not abiding to the rules and regulations set out. Another factor that was raised was black ownership of businesses being an element to consider for the future of OOH in South Africa. According to the researcher's knowledge and attempt to find literature, there is currently no peer reviewed research on this matter in South Africa.

Education and adoption of pDOOH by the clients and advertisers are a high concern especially for the T organisations who are usually the organisations to bring new products or processes to the market. The E organisations monitor this very closely and will choose to make a move or not based on the success that the incumbents have had. The E organisations are small and will avoid high risk costs at any chance. They are also in a beneficial position in the industry as 90% of their inventory is in high demand, in comparison to the T organisations whose holdings are majorially static/traditional OOH. This is not to say that static/traditional OOH is not in demand, but it does not offer the agility or flexibility that is warranted in the current economic climate.

Unfortunately, there is minimal literature from an academic scope on the OOH industry regarding how organisations' strategy is positioned against competitive organisations especially in South Africa. The scope is limited to the formats; revenue generation and consumer preferences. There is evidence that suggests an increase in DOOH inventories which places pressure on all OOH firms to compete. Thus, this research extends the current literature that is currently available for the OOH landscape with regards to digital transformation and business strategy.

6.2.5. Research Question 1: Conclusion

From the above discussion on RQ 1, the OOH companies utilise their culture; drivers of business strategy and their actual business strategy to approach digital transformation. Although digital transformation is not formally labelled as such throughout the 4 organisations, the desire to deliver on relevance and growth strategies through initiatives of digitisation and digitalisation throughout the business signifies that they are actually delivering on some form

of digital transformation within the company. The digitalisation of the industry has been significant for the T organisations who have a high level of legacy inventory in comparison to the E organisations who are competing on their digital strategy.

The OOH organisations are aware of the need to remain relevant within the digital ecosystem by utilising technologies for advancement in the media landscape. This aligns to the theory of digital transformation and most particularly for the T organisations who have had to go from analog to digital, and now to a platform-based business model. In comparison to the E organisations, they started with advanced technologies of DOOH from the onset and are utilising further technologies to advance their positioning by following what the incumbents are doing.

In conclusion for RQ 1 the findings from the research project extend on the current literature that is available whereby the following key findings are reported for how OOH organisations are approaching digital transformation:

- Culture is important in an OOH organisation for digital transformation.
- Advancements in technology drive the business strategy.
- There is no clear digital transformation strategy in the 4 OOH organisations researched.
- The competition in the OOH industry drives relevance for growth and value creation.

6.3. Discussion - Research Question 2

What change management capabilities are OOH companies applying?

Research Question 2 identified what change management capabilities the 4 OOH organisations are applying within their firms due to external forces and technological advancements. This research question acknowledges the efforts that an OOH organisation has taken in order to be competitive within the digital ecosystem. This research question was positioned to get substantive evidence as to how OOH organisations respond to changes in the media and OOH landscape and what challenges they may face along the way. From the literature the main themes that are aligned to this research question are: strategic leadership; digital transformation and change management. The researcher will discuss this research question based on the themes that were identified from the analysis conducted on the results. The following Table 28, indicates the 4 themes from Chapter 5 that will be used for Research Question 2.

Table 28: Summary of themes from Chapter 5 for Research Question 2

Summary Table		Category of Participants			Collective Feedback
Research Question	Theme	Traditional OOH	Entrepreneurial OOH	Expert/professional	
2	Leadership used for change management	⬤	⬤	⬤	⬤
2	Implementation of digital strategy and digital transformation strategy	◑	◑	⬤	◕
2	Enablers of Digital Transformation	◑	◑	⬤	◕
2	Barriers of Digital Transformation	◑	◑	◑	◑

Legend:

⬤ Category evidence and support of the theme for change management capabilities.

◑ Category evidence divided on the theme as an approach or response for change management capabilities.

Source: Author's own

6.3.1. Findings: Leadership used for change management

The 4 OOH organisations have all reported that the leadership of the organisation plays a vital role in driving strategy and ensuring the driving of new products or services to the industry. All 4 OOH organisations have a leadership or executive level that decide on strategy and then cascade this through to the rest of the business. All 4 organisations currently have a horizontal or flat structure of management. All organisations utilise the organisations as a whole for effective digital transformation. The literature reviewed on strategic leadership aligns to the OOH organisations current leadership capabilities for change management.

As reported in Chapter 5, the leadership of the 4 organisations drive change and facilitate changes within the organisation with the following key findings taken from the interviews conducted.

T1LM1 reported that:

> *And it's very, very collective agreement. And then when it gets to be bolted down, I mean, we start with our CEO announcing what the strategy is and presenting it straight to all the staff, but then for the line managers or department heads, executives, and then line managers to actually filter that down to the staff so that the staff know what the particular role is, within the strategy and how they are assisting in in reaching the overall company strategy.*

T2TM1 reported that:

> *I think that's why your senior team needs to be involved in these forums and discussions, because you have to drive change. And you also have to, you know, make people aware that they're on it.*

E2TM2 responded:

> *Yeah, everyone definitely has input. Obviously, the decisions are made by the three shareholders, but everyone has input as to how they think, you know, service delivery, people aren't in the trenches and find out exactly what client wants, how quickly we can do things that would turn things around. So, everyone puts forward the opinions.*

E2LM1 explained the following:

> *So, I mean, it would be it's very simple as obviously, like maybe kind of its senior, call it executive level or shareholder level, you know, there a strategy would be discussed. And then and a kind of a meeting would be held with, with a greater team to kind of unpack that and get their input, and then and then formulate that and kind of execute on it.*

> *There is an overarching sort of, line of experience that comes down from the leader.*

Pro1 explains that:

> *The pivotal point where you drive transformation should be the highest level of organisation. If you, if one tries transformation on the exco level. It's one who decides he wants to do transformation. He doesn't have buy in, it's not gonna work. Even if he has buy-in, people are not going to let go of their domains. It's a recipe for failure. So, you transform what you've got control over.*

> *This is really, really the difference. The ability to transform what you have control over, because if you don't have control over that, you've got to negotiate and convince, but if you are on the same level it doesn't work.*

> *It is driven from the top, the top cascades the vision.*

These findings are had similarity to Wrede et al. (2020) who stated that: "top managers play a key role in firms' digital transformation as they facilitate the necessary establishment of an organizational structure and culture that jointly embrace the challenges and opportunities underlying this significant period of change" (Wrede, Velamuri, & Dauth, 2020, p. 1563).

This is also similarity from a study done by Gokalp and Martinez (2021) that stated that "strategic governance" is a key factor and that "digital transformation strategy needs to be led from the top, with a strong, clear, and inspiring vision of how emerging technologies can create a new future with shared value", in addition "roadmap should be generated based on the vision, and related governance activities should be performed" (Gokalp & Martinez, 2021, p. 7).

A concept reported from Pro2 regarding leadership, is the "digital fluency" that the leaders must have in order to effectively drive change is in agreement with Wrede et al. (2020) who state that: top managers roles have to deal with the "multifaceted nature" of digital transformation within a firm "top managers first (need to) develop a deep understanding about digitalization topics and the implications for the firm themselves, before making choices that affect the organization in both formal (i.e., organizational design) and informal (i.e., organizational culture and relationships) ways (Wrede, Velamuri, & Dauth, 2020, p. 1563).

This statement from Wrede et al. (2020) is in agreement with what the OOH organisations are currently doing through strategy formulation and implementation. The experts/professionals are adamant that change has to be accepted and driven from leadership and this must be cascaded through the organisation. The element of driving the change from the leadership level is key throughout the organisation, not only to the next level to implement.

Therefore, these findings from the research project extend on the current literature of strategic leadership and give insight into a particular type of industry, an OOH industry, going through digital transformation.

6.3.2. Implementation of a digital strategy and a digital transformation strategy

The majority of the interviewees in the 4 OOH organisations reported that implementation and execution of their digital strategies has effective with having departmental strategies or cross-functional teams in place creating a golden thread of change from the vision down. There are no clear strategies or no frameworks for digital transformational strategies in place in the T and E organisations, yet they both have a digital strategy. Key findings include:

T2TM2 reported that:

> I think that it is (important for success), I just think that the business thinks about it a little bit differently here. If you like, it is not a topic. It's not an urgent topic on the table. And I just think the business needs to think about it differently and maybe because it has been siloed. I haven't seen a chart that shows static inventory vs digital inventory.

E1TM2 reported that:

> The brand is going to bleed into every department of the business, there are different departments like the production side of the business side, or whatever the case may be, they'll definitely be, you know, let's call it once. They're siloed strategies, but there'll be smaller strategies in place for different departments, ultimately, still trying to achieve and respect what the overall brand is.

Pro2 reported that:

So, it comes down to, there's no fixed answer, in my opinion. So as a starting point, is take the word digital transformation, take the word digital out of your conversation. And it's great to sit down and say, we are going to develop a strategy, a corporate strategy, to make sure that this business is relevant by 2030… What would be that reasonable value proposition we take to the market, and I would offer the market and then you use that value proposition, you've got to develop, you know what the potential value proposition is, and once you've got that in place, is to reverse engineer that into the technology enablers. And the changes inside the organisations that that would have to take place. So that is one stream, right?

The other way of doing it, if you don't have a specific answer is to say, as part of our digital transformation strategy, is that by 2021, at the moment is that by 2022 15% of our revenues need to be digitally enabled and you need to define what digitally enabled revenues are. And by 2023, they're going to be 30% by 2030 50%, etc. So, what you forcing is the business to move away from analogue plays into digital transformation plays before you know what the answer is. So that becomes the principal for the strategy, that principle gets given to the various functional areas and they've got to go figure out how to create those new sources of revenue.

The literature review offered some clear examples of the implementation of a digital transformation strategy, first from Hess et al. (2016), who developed a framework for digital transformation that addresses a "holistic approach to the development of a company-wide digital transformation strategy" that "identifies four key dimensions of every digital transformation endeavor" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 124). Secondly from Chanias et al. (2019) who developed a process/activity model for digital transformation. Linking to implementation and departmental strategies is the golden thread of change which needs to be filtered through the organisation.

Even if there is no clear strategy for digital transformation, the OOH organisations are trying to implement strategies throughout the businesses with an overarching strategy or business plan and, as stated they have been successful. The expert/professional statements are similar with the findings from the literature review and believe that there needs to be a framework or model to follow.

The measurement of success differs from the T and E, where T focuses on measurement internally and E focuses on customer experience. The T organisations believe that strategies should be reviewed more often and the E organisations believe they are agile enough to implement change as and when required, which is also in agreement with the T organisations as they acknowledge when something is not going to work. Key findings include the following:

T1TM1 reported that:

We have key performance indicators for each person, and they are well defined, well structured, and well measured. We then have our strategy review; we measure that every quarter to see how we're doing against it. And we then at those quarterly updates, we sometimes decide to discard some, some action plan for some strategies and replace them and then we'll move along so it's not really stagnant it's always a moving thing. And again, it's not, it's not a flick of a switch tomorrow or a change that's going to happen, it is gradually changing.

E1TM1 reported that:

If you can understand the objective of the client, and your ultimate goal is to give the client what they need. And those things don't become much less of an issue. Because our intention is to give the client what they need for the objectives that they want to achieve.

E1TM1 reported that:

And so, for us it is we will make mistakes, ensure that we make decisions on everything and we report on it and we give ourselves a specific date in terms of when we have to make a call on this and by when. And so, I think, for us being a small business side of things is Yeah, we're just going to make the decision to move on.

The measurement of the success of digital transformation is crucial when evaluating the success of digital transformation. All OOH organisations will inevitably measure success through revenue growth and generation but they also look at other factors such as employee performance and strategic updates on a regular basis with regards to relevance.

The literature reviewed conveys the need for a clear metrics to deliver success in the organisation. The measurement of digital transformation as seen in the study done by Verhoef et al. (2021) agrees with Teece (2010) on the end goal of digital transformation generating revenues, profits and investor value – but also that "intermediate results" need to be established "via process-related metrics to assess how well the new digital business model is creating value" as put forward by Libert et al. (2016) on digital transformation (Verhoef, et al., 2021, p. 895).

The findings from the research project regarding an actual digital transformation strategy indicate that the organisations do not have a strategy labelled as digital transformation but through their digital strategy of internal and external restructuring, they are digitally transforming. There are various successes that have come about for the organisations but a

clear strategy is needed for the change management of digital transformation as reiterated by the literature.

6.3.3. Findings: Enablers of digital transformation

Although as highlighted above, there are no clear strategies for digital transformation but the need and action for digitisation and digitalisation is communicated through the OOH organisations, the OOH organisations have facilitated digital transformation through specific enablement of the employees; acquiring new talent or the actual business processes and products itself. The experts/professionals insist that communication regarding the relevance of the organisation is imperative in conjunction with education. Peer reviewed literature emphasises the importance of enablers through models or frameworks.

For enabling through education, the following key findings convey the OOH organisations' positions:

T1LM1 reported that:

In terms of our thinking, of where we go in the skills that we need to uplift, definitely aligned to more digital, we want to be able to focus on the digital skills, focus on the skills that we are going to need.

T2LM1 reported that:

You got to educate them, you got to, they need to learn they need to start with that first, you've got to make it part of how they do their jobs.

T2TM1 reports about progressing staff through a company academy:

Depending on you know, what's going on in the lives, the experience, etc, right, and the business, but then there's also a functional side, we absolutely are going to drive people in terms of great, great development, functional skills that they need to learn. You've probably seen in the media, that we've also launched as part of the human capital team, is there's a whole (company name) academy that we started, and that is absolutely geared to develop and upskill our different, you know, people in the business of the organisation at all levels.

E1TM1 reported that:

I've gone out to get talent, I think, over time, it's something that'll be discussed more whether it's through events, or whether it's through other education platforms, where, you know, maybe just supplementing fees for courses, whether it's digital marketing, whatever it is, it's going to be critically important for us in this whole business, to, to, to

do and understand marketing and advertising as a whole, rather than just a billboard advertising because we're part of the larger media mix.

E2TM1 reported that:

So, anyone who joined the business we started, that was the plan. The plan was already in place. In terms of training them, I think, even for me, this programmatic product is still quite new for us. But we need to make a concerted effort to do it. And to, to, I mean, I'm aware of all the different stuff and what can be done and then we get this training and stuff about it, we're not doing it we're not pushing it.

In line with the OOH organisations, Pro2 highlights the importance of the right resources for changes to occur:

So that goes hand in hand, if you're not developing, you cannot progress into new things, unless you've got the resources to progress into those new things, right. And then again, it depends on what initiatives you're looking at, if you're looking at the digital transformation, or the transformation are the core of the business, there's a, there's a good possibility that you can develop and train resources internally, and get them to transition with the organisation. It is quite doable.

Formal and informal education have been highlighted by the T OOH organisations as important for enablement, there are some gaps that the organisations need to consider going forward. According to Gokalp and Martinez (2021) under the process "workforce management" there are elements that include HR skills development and sustainable learning management (Gokalp & Martinez, 2021, p. 8).

In contrast, Pro1 highlighted his opinion that formal training is not needed for digital transformation which links to the E organisations:

Understand what they need to do, like actually physical experience. And what did they learn as we go along? So, no need to do formal training, it's actually on the job, proof of concept, I think that others like to use the term agile - but it's actually exposing you to the actual real world.

The OOH organisations have made it clear that there is ongoing communication to the entire company regarding what the strategy is and what the company needs to achieve in order to stay competitive. Larjovuori et al. (2018), emphasise the "importance of a strategic approach to digital transformation" where "managers must be able to challenge how the organisations operate, engage their personnel in the process of redefining their work roles, and keep their minds open to the possibility that their roles will change as well" (Larjovuori, Bordi, & Heikkila-

Tammi, 2018). For T1 there is the notion that the process is far reaching and in-depth ensuring that there is success and agility where needed. For T2 there is a high level of trust, the team gets told what to do and they do it. We also see this level of trust also permeate in T1 where the LM participants recall how strategy is implemented and their belief in their leaders to do the right thing.

For the smaller E organisations, the ability to enable change is quite fast and agile due to the scale of the business and the driving forces of the leadership enforcing the change, as we have seen from the T organisations too.

The hiring of new talent is considered by the T1 organisation to ensure relevance in the digital economy. Technology is the major factor for T1 for the success of new products, most importantly the implementation.

T1LM1 reported that:

> I would think that our leaders did see what is going on out there and start to bring things in and start to employ people who have the skills for the business, even if we hire somebody with these skills, digital is changing every single day. And if we don't keep our people updated and trained, they've not gonna, be paid for what's coming in three years' time.

> And that goes back to my point of, I don't want (an executive) coming to me in three years' time saying I want a person who can freaking speak to an AI robot. Yeah, I want to start training somebody now already, so that in three years' time, they can speak to an AI robot, and they've got the skills that you need for (the) vision. The focus needs to be a lot more.

T1TM1 reported that:

> So, there's quite a lot of that. We also in specific incidences, recruited people to do that, directly in the new digital world.

E2LM1 explains that for the E2 business, hiring of talent must make commercial sense and the person must be exceptional:

> But if someone's really amazing in what they do, and what they know, and is going to take it to the next level, then I would definitely say, oh, we should get them on board. Yeah. But I think it also comes down to commercial sense, you know.

Pro1 makes a clear statement that individuals of the organisation must also have the capability or ability to learn more, he states that:

Understand the people who do the work, do they have the ability to change?

HR people do competency profiles, we discovered that those guys didn't have the ability to change, so they could run the existing business and we would start a new team to drive the new business.

T2 are currently not considering new talent as needed to progress further, but changes to the business plan will allow for an increase in talent within the organisation.

The OOH organisations are enabling change through communication from the leadership; upskilling of formal and informal education and hiring of new talent for the digital strategy. In accordance with the literature reviewed, it is important to have an enablement structure that is built for sustainability and relevance. The OOH organisations have identified the need to formalise education processes for digitalisation further but have succeeded well through the transition phases. In accordance with this, there is a need for formalisation of DOOH learnings and education. Thus, this research report extends on the theory of change management as an enabler for digital transformation.

6.3.4. Findings: Barriers of digital transformation

Based on the evidence that there is no formal or clear strategy for digital transformation, OOH organisations need to formalise the process to avoid barriers and the literature reviewed conveys some key processes for this. There has been some resistance to change within, which is inevitable with digital transformation – here strategic leadership capabilities and change management capabilities found in the literature review can assist this transition period. Adoption of digitisation and digitalisation has been an issue for the OOH organisations internally and externally, most recently with pDOOH. Education and knowledge may be a solution here as provided by the literature that has been reviewed.

The OOH organisations that have experienced the most barriers are the T organisations who have had to deal with legacy structures; and ways of doing new things that have been brought into the organisation. Some key take outs as follows:

T1TM1 reports on an example when DOOH was launched:

Back in the day, when we first started with our digital screens, as long ago, as, say, 2011 and 2012, the performance of those assets was not very good. We had four digital screens at that stage and they weren't doing well. And we, you've got to have bravery and courage to continue and pursue that because you putting kit in the ground that's very, very expensive. Then you backing a horse that you haven't seen race before, and you pushing. So, it's been that you had to have that bravery to do it.

T1TM1 makes a comment regarding resistance:

But people are generally a bit wary of change, they need to be convinced. And I recall you know, I think we've had there was sometimes difficulty to find bright people, it takes longer than you want it to take. So, there might have been a gap where we've been stretched, but no major problem.

T2TM1 also made comment regarding talent onboard to fix the challenges of adoption:

So, I'll use some of our digital guys, you know, they've launched (product), in 2007, with us. And now there's programmatic and they assume they know everything, ya they keep up to date with things, but you know, we bring new people in, we bring external experts in. And there's pushback, because they believe they know the environment, they know how the product works. And you need to almost temper them back.

And so, you say to them hold back, you have to have a habit of teachability about you. They don't know everything; this is the new trends development. So, you do find that, but it's how do you manage that? I think that's why your senior team needs to be involved in these forums and discussions, because you have to drive change.

T2TM3 reported the following with regards to technology advancements:

Yeah, definitely. I mean, it's been a good, you know, you check worldwide trends. You know, it's just, it's a no brainer, you know, anything. And, you know, what, what scares a lot of people this is how quickly things change.

T1TM2 reports of industry adoption challenges:

And even in dynamic, you know, we've done some stuff, which we thought was fantastic, and we even made people fall over it. And it's still fantastic. So, it's not that's not the problem, it's just that, you know, the market might not be ready for it or for whatever reason, you know, it's, it's, it's maybe just a little bit too out there, you know, or maybe clients don't get it.

T1LM2 reiterates this with:

Our digital space, I mean, we one of the most innovative outdoor companies out there, we've brought solutions to the market to help our clients, unfortunately, not all of them are quick on the uptake.

T2TM1 reported that:

There's always pushback, you know, especially from people that's been in the organisation, that's been doing a certain function for a long time.

The change is not as obvious at this stage for people for them to need to say to themselves, oh, my goodness, I've got to get prepared. We're not there yet. We are getting there quickly, but we're not there, I think, I think the real impact is when it's going to start impacting people's jobs.

T1TM1 reports on the reality of people's jobs being impacted if they do not change:

But if they don't, they know found themselves leaving voluntarily, or involuntarily. They won't be, they won't be employed into the future, because the skill sets that we require today are different from 10 years ago. So just another result with automation on all of the processes, we have reduced the number of sorts of admin type positions because computers to do more and more of the work. And then, those jobs that can get taken up by different people.

T1TM2 reported that:

Or it's just like us, it's sort of word of mouth and you know, use this to get that, or it's done like that. So, I actually don't know, but that's probably one of the failings that we have. But on the other side of that coin is we don't have massive staff turnover. It's not like we've got this, you know, this continuous problem where people are leaving and new people are coming in and you need to train them, but there's no manual to train them.

T1LM1 reported on an example where more could have been done to enable the staff:

But because there wasn't enough training done originally, I felt that although it's very similar, I still think detailed training courses would have been necessary and should have been held with the staff.

But I would have done a lot more in terms of this in the background, this is where we were, this is what we can do for you, I would have spent more time showing the wows of the system to get the buy-in, because there's still a lot of staff who think the system is useless, and it frustrates them.

On another topic, T1LM2 reported the following:

In terms of programmatic and apart from the people that know, I don't think anyone's programmatic ready because it's so flipping confusing. You've got to have a thinking

brain to be able to understand programmatic. So yeah, I think that that's been a difficult transition. I'm not sure if we were all 100% ready for it when it was launched.

T2TM2 reported the need for further training:

I think there has been some of that that are typically lacking in some areas it has, what was one of the things that did come back in the survey that people felt that there wasn't enough of that.

The E organisations made comments about challenges with programmatic that will be addressed further in RQ3 discussion regarding control of business, however E2LM1 made comment as follows that could be seen as a barrier:

Yeah, definitely. I mean, dude, I think it's, like, from a sales perspective, there are a lot of people and from what I pick up in the industry, they're a little bit concerned about it, because it does make you seem a little bit redundant.

Based on the literature reviewed, OOH organisations are not the only media organisations that are faced with the challenge of digital adoption. Crittenden et al. argues that "Given the rapid and continuous digitalization of our economy, it is imperative that educators be at the forefront with curriculum tools and practical tools and in the transformation of our students into employees with the critical thinking, creative and inquiry skills needed to add value in a world in which machines will work alongside human professionals" (Crittenden, Biel, & Lovely III, 2019).

Pro2 had the following to say in terms of resistance to change:

The only thing that that's important as we've got to do it quicker, and more deliberately about transitioning workforces. So, where we are hearing examples of organisations that automatically not cutting back workforces, etc, I do think is that the market is not dealt with it, put them in a very difficult position.

And then the other thing is that if you transition, if you digitally transform your company, against the right business model, you're doing it to unlock additional value inside the business. That means that you do expand the footprint of the company. So, this is fear that if you transform a company, that you lose jobs, but the reality is if you transforming a company for the right reason, the company should expand and grow.

So ultimately, the company has more units that it needs in it does certain jobs, that will be irrelevant. And those jobs typically have negative attributes of low productivity levels, low efficiency levels, error rates, safety, etc. Those jobs are going to be lost, they just get lost quicker. So that's on the digital transformation side. If you on the

innovation side of the business, and you're wanting to move the business into a new adjacency so something that the business it's not core to the business

You're going to - there's going to be resistance. Many people will say, I'm comfortable with change. They're really comfortable with change when they driving the change. But when change happens to you, people become very fearful. They lose positional power, they pray for the jobs, they're afraid for the consequence, who they're going to report into a lot of those emotive things. So, any kind of change inside an organisation is fraught with, with resistance. And that's why important that it's important that if you do bring about a significant change inside the business, be swift, be deliberate, you know, organisations that are soft, in trying to bring about change management, all they do is they exhaust the business.

And after a while, people are exhausted with change, etc. And any kind of antibodies inside an organisation are reinforcing a couple of things - antibodies exist inside organisations, they're often not at the junior levels. The biggest resistance I find, specifically to digital transformation is at the most senior levels of the organisation senior management, and upper to senior upper middle to senior management,

Unfortunately for this research project there was no evidence on OOH companies' education for digitisation. Research done by Hess et al. (2016) on German media owners established a framework that identifies a framework to allow for digital transformation which includes "structural changes" that "refer to the modifications in organizational structures, processes and skill sets that are necessary to cope with and exploit new technologies" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 124).

On a South African level, recent research done by Mokoena et al. (2021) conveys the need for education in the advertising agencies in South Africa due to them experiencing digital disruption implications. Mokoena et al. highlight "that ignoring the digital disruption by advertising agencies (AA) increases the risk of erroneous decision-making and losing ground to digitally savvy competitors" (Mokoena, Prinsloo, Gawlik, & Pelser, 2021, p. 1). With pDOOH being new to all OOH organisations, the need for standardisation and education on the product has been highlighted by organisations. There are also external concerns with pDOOH which can be attributed to what Mokoena et al. (2021) have conveyed regarding industry education on the digital products and technology.

With pDOOH being so new in South Africa, this research adds to the theory of digital transformation strategy in relation to barriers that implicate successful adoption of digital transformation strategies within an OOH organisation.

6.3.5. Research Question 2: Conclusion

The OOH organisations have applied the following change management capabilities to the organisations to enable digital transformation and they link to the theories of strategic leadership; change management and digital transformation.

1. Leadership drives the change throughout the organisation.

2. Implementation of business strategy or digital strategy, with no clear digital transformation strategy.

3. Enabled change through communication; hiring of new talent; digitisation and digitalisation.

Barriers to enablement have been indicated as a key factor by the OOH organisations and the expert/professional during the interview process. These include resistance to new ways of doing things; industry adoption reluctance and lack of knowledge of digitisation. With this included in the research project, and the lack of literature on the OOH industry in South Africa from an organisational standpoint, this evidence extends to the theory of change management by highlighting issues that may occur during the digital transformation process.

6.4.   Discussion - Research Question 3

What is the success from change management and digital transformation capabilities that OOH companies have tried to apply?

Research Question 3 identified how successfully the 4 OOH organisations have applied change management and digital transformation capabilities within their firms by highlighting key digitisation and digitalisation achievements. This research question acknowledges what new or transformed processes or products have been added to the business models of the OOH organisations and how they have achieved it. From the literature the main themes that are aligned to this research question are: the media industry; the OOH media industry; digital transformation and strategic leadership. The researcher will discuss this research question based on the themes that were identified from the analysis conducted on the results. The following Table 29, indicates the 3 themes from Chapter 5 that will be used for Research Question 3.

Table 29: Summary of themes from Chapter 5 for Research Question 3

Summary Table		Category of Participants			Collective Feedback
Research Question	**Theme**	**Traditional OOH**	**Entrepreneurial OOH**	**Expert/professional**	
3	Successful digitisation/digitalisation of business	⬤	◐	⬤	◕
3	Hybrid Business Model	◑	⬤	N/A	◑
3	Hired Talent for the job	⬤	◐	⬤	◕

Legend:

⬤ Category evidence and support of the theme success of change management bringing digital transformation.

◑ Category evidence divided on the theme success of change management bringing digital transformation.

Source: Author's own

6.4.1. Findings: Digitisation/digitalisation of business

The T organisations have successfully implemented digitisation and digitalisation into products and processes through the digital transformation of its organisation via change management capabilities. The T organisations have had to fight for survival and have shown resilience and bravery through investing in digitalisation. The E organisations were built on a digital strategy and they did not have to transform or adopt legacy systems or paradigms that would have caused challenges like the ones faced by the T organisations. However, it is important to both E organisations that they remain relevant and produce growth for the organisation. There is literature that supports the ongoing need for digital transformation within an organisation.

The T organisations have successfully implemented automation throughout most of the organisation to ensure efficiencies in delivery of service across the organisation.

T1TM1 reported that:

> *So, but it's not really labelled digital transformation. But each department is certainly adopting technologies that make the performance of the ultimate responsibilities and tasks easier and more efficient. So, everyone, everyone is doing that in some form or other.*

T2TM1 reported that:

> *The way we structured we've got a digital vision. So, you know, a specialist, and you know, you must understand digital as well there's a lot of components. So, there's the hardware software management side of it, there's the reporting side of it. And then obviously there is the transacting and selling side. You know, when we, the biggest operator of digital play space network probably in X, there is also a content site we manage.*

Similarly, to the T organisations, E1 has fully automated its processes from start-up. In comparison, E2 still needs to automate a number of its processes but is aware of and open to the changes.

E2LM1 reported that:

> *I think it will eventually get to a point where it is heavily geared towards automation in and that'll be like processes and software and technology, internally, both on the media side, and agency side and client side.*

From the study done by Chanias et al. (2019), it is stated that "DTS is a "moving target" that seems to be continuously in the making, with no foreseeable end". The OOH companies they are constantly having to adapt to the changes of the environment in order to survive in the digital age. Evidence from the findings of the research on the successes of the OOH organisations indicate as per Porfirio et al. (2021) that "digital transformation forces companies and industries into organizational changes and critical business adaptations if they want to survive and prosper" (Porfirio, Carrilho, Felicio, & Jardom, 2021, pp. 616-617). Similarly, in accordance with Hess et al. (2016) although the OOH organisations do not have a clear digital transformation strategy, the OOH organisations have undergone a "transformation process resulting from the integration and use of digital technologies" (Hess, Matt, Benlian, & Wiesbock, 2016, p. 125).

In conclusion, the OOH organisations have on a number of levels successfully implemented digitisation and digitalisation through digital transformation. However, based on the evidence from the literature review, they have gone about this without a digital transformation strategy which has left some barriers as described in the findings and discussion for Research Question 2.

6.4.2. Findings: Hybrid business model

Looking at the successes and a way forward of digitisation for the OOH organisations as reported above, the OOH organisations have had to radically position DOOH into the digital ecosystem through the implementation of pDOOH which uses software for the automation of buying and selling DOOH through impression-based ads. Launched in South Africa in 2020, the OOH organisations have all emersed themselves into the process of automation of selling and buying with 3 of the organisations having successfully launched pDOOH as an offering to the market and the remaining organisations launch is imminent.

The OOH organisations reported the following key things:

T1TM2 reported the relevance of pDOOH:

So, through, through the programmatic, we've been able to align ourselves a little bit closer to what is happening in the social and mobile environment. When I say align, that's really what it is. Because we're not the same thing. But we are able to tap into those sorts of markets, which is a good thing for us, because that's where, arguably 40% of all ad spend cash ends up.

But I think there's going to be more growth for programmatic. And I don't think it'll ever replace the money that we're used to getting with (traditional) digital. But it'll certainly help us compete a little bit better.

E1 from start-up had pDOOH as an offering for advertisers, with E1TM2 reporting that:

You know fortunately for our squad, yeah, (company name) the guys are pretty much ingrained in the out of home space. (leader) has been talking about programmatic out of home, for the better half of two years, our business has been programmatic, really, from onset, we knew being a digital first business is part and parcel of being, you know, programmatic forward, due to the uptake, and obviously what we're seeing globally. And therefore, as far as change goes, we've essentially really been at the forefront. So, I can only imagine in a much bigger organisation with a lot more heritage, that kind of conversation might be a bit different. But for us, we've entered on the front foot.

E2TM1 reported that:

I mean, absolutely. I mean, we, we've always been saying, it's, it's coming programmatic is coming, programmatic is coming. But we, we probably, we probably started a bit, a bit late, to be honest. But, you know, I think, again, we were we were trying to start a brand-new company. So, there was a lot going on. So yes, we might have lost that a little bit. But I think I think it will catch up. And what's nice now is, every single one of our screens is setup on board, and it's working.

E2 reports on some concerns that are reiterated about pDOOH from E1.

E2TM1 reported the following:

I'm a bit worried about programmatic. If I'm honest, I think (other media owner) would know the potential of selling the traditional sort of slot system that we have at a rate is good. You know, and it is a, for me, it's quite important. And my concerns around the programmatic is just the, what it's made for the ability for clients to, to get far more reach with far less spend, and they book(buy) things a lot clearer. Look, it's lovely to have an income generating thing while you're sleeping. But it's small, you know. And I

do worry that as more and more agencies adopt it, I do worry that we might see like the overall spend actually drop because they're using it from far more cleverly.

E1TM1 reported that:

I think it will develop over time, I'm not overly excited, over programmatic and things like that, but only because I need to see where the benefit is, I can see benefits for some people, I can't see benefits for all people.

The ability to get information and see a tracking line and my impressions, I love it. That's awesome. But the loss of control as a media owner to privacy control over my inventory, and that initial negotiation and discussion with clients is a big problem is it's not the end of the world, but it's problematic.

There have been some adoption and implementation challenges of pDOOH for 2 of the organisations that have launched pDOOH as an adjacent product to the core model, and the following was reported:

E2TM2 reported that:

I mean to be honest; I don't know if (media owner) might be the same? I don't think people fully grasp this, really, I don't think so and I think we learned that a couple of people have - so that's my role here I look after all the digital stuff and I think in time now there's actually a role for someone to come on board and to take ownership of it so at the moment I don't think they've learned it. So, I don't think they've embraced as well as they should have. But again, it's only been eight months.

T1LM2 reported that:

So honestly still, I'm trying to come to grips with half of this programmatic stuff. I'm probably because my brain doesn't understand it that well. And even, and even after being trained on it a few times, I still, every now and again, have to turn around and go, okay, please explain because I really don't understand what's going on, you know, I'm getting there slowly. But you're with your DSPs, and your SSPs. And all that type of stuff. It is, it can sometimes get confusing. In fact, we running a campaign now. And the guys ask questions, and are just like, look at it another way, they don't understand what you're talking about. Yeah, no, it's not. I suppose, from my point of view, I could probably educate myself more.

The above findings from the OOH organisations link back to the barriers of digital transformation that have been established in RQ2 regarding education and knowledge of the process or digitisation and digitalisation of the product. As reported in the discussion of RQ2,

the literature to support this can be found in the work done by Hess et al. (2016), Crittenden et al. (2019) and Mokoena et al. (2021).

When asked about OOH organisations remaining a hybrid business model in the near future or if it will become fully platform-based, the findings were that it will definitely remain hybrid for some time and but the human element will still be important once it goes to fully platform-based. The participants in the OOH organisations reported the following:

T1TM1 reported that:

> *It will be a hybrid platform for quite some time. And then you will probably find over time it will shape or the hybrid will change to a more automated, bigger percentage of the company will come from automated.*

T2TM1 reported that:

> *I think it will remain a hybrid model for the foreseeable future. If I say foreseeable future, probably in the next few years. I don't think humans will be out of the process. I think there still will be human intervention.*

E1TM2 reported that:

> *You know, they're still selling in a in a dual process overseas. And I don't see that going away anytime soon. Yeah, specifically, I think there'll be some stuff. But I think, for the most part, a lot of it will just be done through human interaction and selling the way we have done traditionally. And that, for me, that standpoint goes without saying, across multiple industries in a sales perspective, I don't think you can completely replace a human or automate a sale.*

E2TM1 reported that:

> *I don't think it will never be a fully automated model, there will always be percentage available for the traditional battle.*

E2LM1 reported that:

> *But also, I don't think programmatic is going to dominate fully, you know, what I mean? There's always going to be that human, humans are going to buy from humans, and there's going to always going to be that feeling involved, you know?*

Through the process of this digital transformation there have been challenges along the way in terms of understanding and adoption both internally and externally, however the organisations are determined for the success of this product. With this in mind there are concerns raised by the T and E organisations that they believe should be addressed through

education and standardisation. Thus, linking to the barriers of change management in the findings and the discussion on RQ2 and again linking to the literature found in the work done by Hess et al. (2016), Crittenden et al. (2019) and Mokoena et al. (2021).

What is evident with the hybrid business model is that it is adjacent to the core traditional business of all 4 companies and does not have absolute buy-in from the entire organisation or it is not driven by the leadership. The leadership initiated the change to a hybrid business model, as the need was established to compete within the digital economy and adopt faster processes for client satisfaction. But the implementation throughout the organisations is weak. It is established that those that are only directly involved in pDOOH understand it and grasp it fully. Unfortunately, there is no current academic literature to support the implementation of pDOOH into an OOH organisation including external adoption.

The existing research on the hybrid business model

6.4.3. Findings: Hired talent for the job

Hiring new talent for new products or processes is the favoured approach by the T organisations, whereas the E organisations are working through the processes internally though digital transformation. The difference here is that the T organisations have a legacy of different media formats with a salesforce and operations force that is aligned to traditional formats and ways of selling, whereas the E organisations are built as digital from scratch. However, the E organisations make it clear that talent is needed in the organisation to run pDOOH. This could be because they see this product as being incredibly relevant in the future and the current workforce may not be able to handle its magnitude. Key findings include:

T1LM1 reported that:

> The guys that actually are making things work, have all been hired and from the right place, because they know what they're doing. And they're very good at what they do. So yeah, I think in one of (CEO) strategies, I think is people from the top drawer and I think from that end, he's definitely got that right.

> But it's nice that whenever I'm with clients, or whether with other people talking about it, there's always at least two other people that know more than you that can fill in the gaps that I don't know.

T2LM1 reported that:

> I really do, I think we could be a lot better at what we doing. Let's just focus really, and get things like Chief Information Officers, and that, you know, you need to start bringing

those people into the business that can understand that component and run it properly. We undergoing a big movement and change in our marketing team.

The E organisations have hired their current talent from start-up and have upskilled where necessary.

E1TM2 reported that:

And as we grow, that's definitely going to be part and parcel of, you know, developing people hiring the right folk, and ultimately, essentially, making sure that they're equipped to be the best in the marketplace, whether that is providing solutions, and ultimately knowing how consumers are gonna want to buy or how they're gonna want to essentially do or conduct business and we all need to ensure that whomever we bring on board or is included, that we are well equipped and prepared for it. Okay.

For pDOOH E1TM1 responded with:

That's why we need to, we need to make a plan there. So, we actually haven't done it to be honest, but it's a huge focus for us. And I think the solution is a dedicated resource to be honest.

E2TM1 reported that:

I mean, upskill into the max, but we are probably going employ specialists, that will be the, that'll be the goal. So again, you want everyone to be as good as they can and at what they can do.

The OOH organisations have mainly hired or are looking to hire specialist skills for the advancements that they require with regards to digitisation and automation. This is in line with the literature review conducted on change management, firstly by hiring people to implement change, as highlighted by Kane et al. (2020) and secondly, creating an environment that attracts talent for the digital economy as dicussed by Verhoef et al. (2021).

The experts/professionals highlighted some key learnings of hiring new skills or upskilling.

Pro1 reported that:

So, we've seen stuff before where you want to do multi skilling approach, you want to bring processes together, and suddenly just discovered, but those people that you've got, they, they are not qualified. They're also not trainable, they just don't have the capacity to deal with something new. What do you do? (You) are going to bring in a new team to get the new business going and keep this old one separate for now.

Pro2 reported that:

So, it's quite possible that to you, at the beginning, you'll need a blend of external skills to kickstart an innovation process. So, in that instance, hire an organisation or hire the right professionals to come into the business with the technical skills, or what happens, what we see a lot at the moment is an organisation will acquire another organisation and bring them into the fold, and then become a stepping stone into this new environment.

In conclusion for hiring of talent to do the job, the T organisations have hired talent to assist the digital transformation process and to do a particular job. The E organisations are reluctant to hire new talent currently, but they ensured they had the right talent for the business strategy form day 1. Their focus is on growth of their current products but will definitely hire in the future. Based on the findings from the literature, hiring of talent is an enabler of change management and digital transformation. Thus, this research adds to the current literature of change management and digital transformation.

6.4.4. Research Question 3: Conclusion

The OOH organisations have differing levels of successes of change management and digital transformation capabilities in their organisations through the following findings:

1. Digitisation/Digitalisation of the business is spearheaded by the T organisations, with the E1 organisation also having successfully digitised its business from day one.

2. A hybrid business model has been the biggest challenge, with resistance and concerns for the OOH organisations.

3. Hiring of talent is an agreeable solution for all the OOH organisations, however the E organisations will evaluate if and when ready to do so.

The OOH organisations as established in the discussion for RQ 2 do not have a defined or clear digital transformation strategy as advised by the literature, which would explain gaps in the digitisation or digitalisation of the business. The hybrid business model is new to all OOH organisations and like the research report has indicated in RQ2, lack of knowledge and education of the model is a barrier for progression. Hiring of new talent has been successful for the T OOH organisations, but it upskilling and driving knowledge is also vital for success in the digital ecosystem. Unfortunately, the literature review was unable to obtain any insights from an organisational, process and structural standpoint on successes of OOH companies. This evidence extends to the theory of change management and digital transformation by understanding what successes the OOH organisations have obtained and what future challenges they may be met with due to a lack of a clear digital transformation strategy.

6.5. Chapter conclusion

The research findings from Chapter 5 and the literature from Chapter 2 allowed for a clear discussion on the OOH organisations and the expert/professional that were interviewed for the research project. The research findings had differences and similarities between the traditional, the entrepreneurial and the expert/professional.

There have been a number of similarities that align to the findings and the literature on other industries with regards to the participant categories and how they utilise change management as an enabler for digital transformation. However, it is evident from the findings that there is no clear digital transformation strategy in any of the OOH organisations as suggested as a key enabler by the expert/professionals interviewed and the literature from Chapter 2.

With the E organisations being built on a digital strategy it is important to note that the T organisations have been found to be the ones who are pursuing some form of a digital transformation without labelling it as such while the E organisations will wait to see what the T organisations will do, then only react.

In general, it has been established that South African OOH organisations are largely understudied with regards to management; leadership; and structural and operational processes that allow for business growth and development.

Table 30: Updated conceptual framework

Source: Author's own

CHAPTER 7: CONCLUSIONS

7.1. Introduction

This chapter presents a closing argument of the research contribution on change management as an enabler for digital transformation in an OOH organisation. The three research questions presented in Chapter 3 have directed the findings of the participants interviewed in Chapter 5 which were then discussed in Chapter 6 in alignment to the literature in Chapter 2.

The study was conducted in order to explore what change management capabilities South African OOH organisations are utilising as a response to the drastic and threatening change in the media landscape brought on by the growth of digital media in the past decade (PWC, 2019). At the time that this research was conducted, there was no existing extant literature on change management or digital transformation within an OOH organisation. The study was set out to separate and explore the organisational change management capabilities from the DOOH products, which have been researched to a certain degree on a global and local level (Burton-Jones, Casey, Draheim, & Eden, 2019 and Roux, Mposi, & van Zyl, 2020).

In addition to this, the OOH organisations, through the technological advancements of DOOH towards pDOOH, have developed hybrid business models that have been positioned as an attempt to align to the digital media ecosystem. DOOH as a product is positioned to capture the share of online through this digital disruption as OOH now speaks the language that digital media buyers know and understand: agility, impression-buying (CPM rated) and the ability to turn campaigns on and off (Billboard Insider, 2021). With the OOH organisations utilising a newly developed adjacent business model to the core business of selling OOH, the need for change management as an enabler of digital transformation was established for the purpose of this research study.

The extant literature reviewed focused on what current research was available to support the study or how the study could add value to existing gaps within the theory. The transformation of the media landscape and the OOH media landscape literature aided in adding contextual relevance to the business problem. The theory of change management has been reviewed as an enabler with relevance to digital transformation. Research conducted by Altman & Tushman found that "there is a need for further research" on what dynamic capabilities and strategic leadership capabilities are needed for a business to be successful in a hybrid business model or digital transformation" (Altman & Tushman, 2017, p. 199). It also found that their research required further understanding of what challenges there are to strategic leadership with having a "hybrid product, services, or reseller organization" (Altman & Tushman, 2017, p. 199). In addition to this "there is no clear understanding of which

organisational choices are more effective in allowing traditional companies to integrate new digital competencies" (Appio, Frattini, Neirotti, & Petruzzelli, 2021, p. 5).

This chapter will explore the theoretical, business and managerial implications from the findings of this research project. The chapter concludes with limitations of the research that have been recognised and suggestions on areas for potential future research.

7.2. Principal conclusions

7.2.1. OOH organisations approach to digital transformation

Research Question 1 identified how the OOH organisations have been approaching digital transformation within their firms due to the onset of the growth and demand of digital media in the media landscape. The findings established what the driving forces were behind an organisation's business strategy and its approach to digital transformation.

Through conducting the interviews and the analysis of the data it was evident that all 4 OOH organisations do not have a clear digital transformation strategy. However, the T organisations are conducting some form of a digital transformation throughout their organisation but as yet, there is no clear strategy.

The T organisations have had to adapt significantly due to advancements in the digital ecosystem due to legacy processes, organisational structures and products. Where, in comparison, the E organisations were built on a digital strategy from the start of the business and have less need for change management to a certain degree. Digital transformation is more evident in the T organisations than in the E organisations due to this difference. However, the industry plays a vital role in how both organisations are responding to advancements in technologies and the digital ecosystem.

Culture for the OOH organisations has been found through the analysis of the data to be incredibly important for driving growth of the organisation. Key words and statements aligning to the culture of the organisation were collected from all 4 OOH organisations, these include some of the following: accountability; high-performance; innovative; flexible and competitive. The expert/professionals report on the pivotal notion that desire to change must be explicit within the organisation. Conclusively, this finding identified in the results of the research are similar to the extant literature on culture. Most clearly by the research conducted by Solberg et al. (2020), Shekhar et al. (2020) and Wrede et al. (2020).

Although there is no clear digital transformation strategy within the 4 OOH organisations, it is advised from the extant literature from research conducted by Hess et al. (2020), Chanias et al. (2019) and Larjovuori et al. (2018) that there should be a clearly defined digital

transformation strategy. The three categories interviewed all determined the market as a driving force for business strategy, most particularly the products and processes that are developed through digitisation and digitalisation resulting from the advancements of technology. All of the OOH organisations have business strategies that are driven by some form or adoption of digital transformation that has been influenced from the external environment due to advanced technologies and the growth of digital media. Conclusively, these findings are similar to the extant literature on what digital transformation does for an organisation and align to the research conducted by Hess et al. (2020), Burton-Jones et al. (2019) and Bresciani et al. (2020). Unfortunately, at the time of this research project there was no extant literature that provides an understanding of digital transformation within an OOH organisation, current research is focussed on commercials and consumer perspectives. Therefore, this study adds to the theory of digital transformation from an OOH industry perspective.

The Media and OOH landscape has made the OOH organisations act on the advancements of technologies available to them and help position them within the immediate environment and the digital ecosystem. An increase in the demand for DOOH and the capability to integrate with digital media is an attractive sentiment to the OOH organisations. This is similar to the extant literature from the research conducted by Lee & Cho (2019).

Regulation of the OOH industry was highlighted in the study findings as an issue to the OOH organisations and may create a barrier to or hinder the growth of the organisation. Unfortunately, at the time of this research project there was no extant literature that provided support for this finding. Therefore, this study adds to the theory of strategic leadership and digital transformation from an OOH industry perspective.

pDOOH is a new product in the OOH market that has created a hybrid business model for the OOH organisations. The findings of the study indicate that there is a problem with a lack of knowledge and adoption of the product in the market and in the organisation. Unfortunately, at the time of this research project there was no extant literature that provided support for this finding. Therefore, this study adds to the theory of strategic leadership, change management and digital transformation from an OOH industry perspective.

7.2.2. Applied change management capabilities from an OOH organisation perspective

Research Question 2 identified what change management capabilities the 4 OOH organisations are applying within their firms as a response to technological advancements and the competitive digital ecosystem and digital media channels. The findings established the key

capabilities within the OOH organisations including the enablers and the barriers of digital transformation within an OOH organisation.

The 4 OOH organisations all reported in the study that the leadership of the organisation plays a vital role in driving strategy and ensuring the driving of new products or services to the industry. The leadership of the 4 organisations drive change and facilitate changes within the organisation. The experts/professionals reported in the study that change has to be accepted and driven from leadership and this must be cascaded through the organisation. Conclusively, these findings are similar to the extant literature on strategic leadership for change management as an enabler for digital transformation and align to the research conducted by Wrede et al. (2020) and Gokalp and Martinez (2021).

Implementation of a strategy has been identified as an important change management capability within the findings of the study and the extant literature. As indicated above, the OOH organisations have no clear digital transformation strategy but they do have a digital strategy. Conclusively, the 4 OOH organisations reported that implementation and execution of their digital strategies has been effective with having departmental strategies or cross-functional teams in place creating a golden thread of change from the vision down. These findings are generally similar to the extant literature on research conducted by Hess et al (2016) and Chanias et al. (2019) on digital transformation and change management.

With implementation comes the measurement of success of the implementation conducted for digital transformation. All OOH organisations will inevitably measure success through revenue growth and generation but they also look at other factors such as employee performance and strategic updates on a regular basis with regards to relevance. Conclusively, these findings are similar to the extant literature on change management and digital transformation and align to the research conducted by Verhoef et al. (2021) and Libert et al. (2016).

The key enablers of digital transformation identified from the findings in the study of the OOH organisations include the following similarities across the 4 OOH organisations: enabling through education and upskilling; insurance of the right resources for the job and communication across cross functional levels. A difference between the two sets of OOH categories is the hiring of new talent to enable digital transformation, which is not a priority for the E organisations due to their current strategy but will be a consideration in the future. Pro1 identified learning through doing as a key enabler of digital transformation.

Generally, the findings from the study on this research question regarding enablers of digital transformation are similar to the extant literature on strategic leadership and digital transformation from Larjovuori et al. whereby their research stated that "managers must be able to challenge how the organisations operate, engage their personnel in the process of

redefining their work roles, and keep their minds open to the possibility that their roles will change as well" (Larjovuori, Bordi, & Heikkila-Tammi, 2018). In addition, the research conducted by Gokalp and Martinez, emphasises the developing of skills "and sustainable learning management" (Gokalp & Martinez, 2021, p. 8). Therefore, this study extends to the theory of strategic leadership and digital transformation from an OOH industry perspective on enablers of digital transformation.

Barriers to digital transformation in an OOH organisation from the study conducted have been linked to resistance and problems with adoption, which ultimately stem from the lack of knowledge or skill. The gap that is evident as a result of not having a formal digital transformation strategy could assist this based on the findings from the extant literature. Adoption of digitisation and digitalisation has been an issue for the OOH organisations internally and externally, most recently with pDOOH. Conclusively, these findings are similar to the extant literature on change management and digital transformation and align to the research conducted by Crittenden et al. (2019), Hess et al. (2016) and Mokoena et al. (2021). However, these studies are not representative of an OOH organisation but they do cover media and advertising, with Mokoena et al. (2021) conducting a significant study on the advertising agencies in South Africa. The analysis from Mokoena et al. (2021) research highlight some key challenges that are also evident on the side of the traditional media owner side.

7.2.3. OOH organisational successes of change management and digital transformation capabilities

Research Question 3 sought to explore the successes that have transpired in the 4 OOH organisations through utilising change management and digital transformation capabilities. The findings established if there were key successes of the OOH organisation through digitisation and digitalisation of the business; exploring the implementation of a hybrid business model for pDOOH and the implications of hiring new talent to bring success.

The T organisations have successfully implemented digitisation and digitalisation into products and processes through the digital transformation of its organisation via change management capabilities as they acted on the ability to utilise advanced technologies to position the company adequately into the landscape. The E organisations, who are built off a digital strategy did not have to go through the vast changes that the T organisations have had to do over the past 20 years. All 4 OOH organisations are privy to the notion that they must remain relevant in the highly competitive landscape and must continuously evolve and innovate to have a competitive advantage. Conclusively, these findings are similar to the extant literature

on digital transformation and align to the research conducted by Chanias et al. (2019), Porfirio et al. (2021) and Hess et al. (2016).

The hybrid business model is currently in its infancy stage in South Africa for the OOH organisations. The onset of pDOOH has disrupted not only the OOH organisations organisational and structural processes and systems, but also the external environment procedures with advertisers. There have been some adoption and implementation challenges of pDOOH for the organisations that have launched pDOOH into the market. However, all 4 OOH organisations believe that pDOOH is important for OOH and will continue to navigate the challenges in order to come to a successful standpoint within the digital ecosystem. With this in mind there are concerns raised by the T and E organisations that they believe should be addressed through education and standardisation. Conclusively, these findings are similar to the extant literature on digital transformation and change management and align to the literature found in the work done by Hess et al. (2016), Crittenden et al. (2019) and Mokoena et al. (2021). At the time of the research project there was no extant literature regarding how OOH organisations are approaching the hybrid business model or pDOOH from an organisational level, thus, this study does extend to the research conducted by Hess et al. (2016), Crittenden et al. (2019) and Mokoena et al. (2021) from an OOH industry perspective.

Hiring of new talent has been reviewed as an enabler for digital transformation within Research Question 2, however, it must be noted that the T OOH organisations highlight the successes of hiring talent for the job need to be noted. The E organisations have hired their current talent from start-up and have upskilled where necessary. The expert/professionals agree on hiring talent to kick start processes where you do not have the adequate talent inhouse. The OOH organisations have mainly hired - or are looking to hire – employees with specialist skills for the advancements that they require with regards to digitisation and automation. Conclusively, these findings are similar to the extant literature on change management highlighted by Kane et al. (2020) and Verhoef et al. (2021).

Further findings from this research question give insight into what the OOH organisations believe the future of OOH looks like. According to the OOH organisations, the human element of sales will always remain important, however they believe that in the future all transactions of buying and selling of OOH will be platform-based.

7.3. Research Contribution

This research project contributes to the strategic leadership; change management and digital transformation literature and theory, through the contributions and extensions made. The study contributes to the literature through the extensions made in the literature proposing a link between change management and digital transformation.

Furthermore, this study contributes to literature on the media and advertising industry through the contribution of advanced technology adoption within the digital ecosystem. There are similarities within the findings of the research and the literature that extend on the transformation of the media landscape.

To the best of the researcher's knowledge, this research is the first to investigate change management capabilities within an OOH organisation that has had to utilise strategic leadership and change management capabilities or enablers for digitisation; digitalisation and digital transformation in an effort to remain relevant and advance customer value.

7.4. Implications for management

The extant literature from Chapter 2 provides an in-depth understanding of the theories of strategic leadership; change management and digital transformation across a variety of industries as well as the generic application of frameworks and processes for an organisation. However, the literature available on strategic leadership; change management and digital transformation within the media industry is limited.

Further to this, and to the best of the researcher's knowledge, there is currently no available extant literature that has studied strategic leadership; change management and digital transformation of an OOH organisation, relating to how an OOH organisation's organisational and structural processes have been digitally transformed in an effort to remain relevant and advance customer value in the digital ecosystem. Through the findings of this research project the following change management capabilities have been identified for successful enablement of digital transformation:

Firstly, the entire leadership of the organisation must completely support and drive the digital transformation initiatives that have been proposed at the strategy level. These are based on what drivers have been identified from the external or internal environments for digital as a "business imperative" as said by Pro1. With this, the leadership must have a clear understanding of what is happening in the media and digital ecosystem to ensure that they are well equipped to cascade the changes into the organisation. Pro2 noted that the leadership must have "digital fluency" in order to implement change.

Secondly, The OOH organisation needs to evaluate if the change proposed is soft or hard. Is it an opportunity for growth and expansion or to create an entirely new adjacent business? Does the change integrate throughout the organisation or does the organisation create a separate business to the core business?

Thirdly, a digital transformation strategy is needed for digital transformation. In this strategy the leadership will have control of change management capabilities that need to be put into place in order to achieve the desired results.

Fourthly, the leadership needs to evaluate if the organisation has the skills and capability to actually make the changes. Here there needs to be an evaluation of the scope of the change, whereby a decision must be made to upskill existing employees or hire new talent to drive the digital transformation process. A decision to hire experts in digital transformation or digital fields must also be considered in order kick-start the process for the organisation.

Fifthly, the leadership must announce the change to the entire organisation and then continue to communicate milestones of the digital transformation process.

Sixthly, culture and the right mindset of the organisation will assist in obtaining the desired results of the digital transformation strategy. A high level of trust; accountability and high performance is needed to be competitive within the industry.

Seventhly, implementation of the digital transformation is vital for success and this is managed through the digital transformation strategy and driven by the leadership of the organisation.

Finally, education and knowledge of the market and the digital ecosystem must be a priority for the OOH organisations in order for the employees to understand why the change is happening and to allow the employees to upskill their capabilities for relevance in the future. In addition to this, educating and informing the external stakeholders of the change will allow for easier adoption and less resistance to the change.

7.5.   Limitations to this research

The limitations to this research project are as follows:

1. Limitation on the impact of the advancement of technologies and the growth of the digital ecosystem and digital media has only been researched on OOH organisations within the South African media landscape and on no other traditional channels.
2. Limitation of a small sample of the OOH industry. Only 4 out of over 240 plus OOH media companies in South Africa have been researched for the purposes of exploring change management as an enabler for digital transformation in an OOH organisation (Warburg, 2021).
3. Limitation of time, which limited the number of interviews for the study due to the prerequisite time frame to complete the research report.
4. Limitation of the inability to interview more LM in the E organisations due to the organisations being small.

5. Limitation that the research only investigates change management and digital transformation capabilities at a management level and does not take into account the views and attitudes of other levels within the OOH organisation.
6. Due to time constraints, the transcribing of the interviews was done on an online platform source called Otter.ai.

7.6. Recommendations for future research

Based on the findings from the research conducted, the following recommendations are proposed for future research:

Firstly, it would be beneficial to research the companies across the country based on the scale of the company, as an example SMME's to large corporations.

Secondly, the research study has been conducted in South Africa and it would be valuable to get insight from OOH companies from other countries as to how change management has been used as an enabler for digital transformation within the OOH organisation.

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APPENDIX 1: CONSENT FORM

I am conducting research on *change management as an enabler for digital transformation in an out-of-home media business*. Our interview is expected to last one hour, and will help us understand *How can change management capabilities of an OOH company influence the success of digital transformation for the organisation with a hybrid business strategy.*

Your participation is voluntary and you can withdraw at any time without penalty.

By signing this letter, you are indicating that you have given permission for:

- The interview to be recorded;

- The recording to be transcribed by a third-party transcriber, who will be subject to a standard non-disclosure agreement;

- Verbatim quotations from the interview may be used in the report, provided they are not identified with your name or that of your organisation;

- The data to be used as part of a report that will be publicly available once the examination process has been completed; and

- All data to be reported and stored without identifiers.

If you have any concerns, please contact my supervisor or me. Our details are provided below.

Researcher name: Research Supervisor name:

_____   _____

Email: _____   Email: _____

Phone: _____   Phone:_____

Signature of participant: _____

Date: _____

Signature of researcher: _____

Date: _____

APPENDIX 2: CONFIDENTIALITY AND NON-DISCLOSURE AGREEMENT

It is a condition of engagement that students will assist in preserving all confidential information, ideas and plans; any confidential information or any information in respect of any data gathered, captured or analysed in respect of the research work they undertake in fulfilment of GIBS masters or doctoral degree programmes, in this case the research project titled *Change management as an enabler for digital transformation in an out-of-home media business* conducted by Jorja Wilkins.

The parties under this agreement agree to the following:

1. To apply their best efforts to keep any information confidential which has been acquired or may acquire pursuant to the research work. For the purposes of this clause, confidential information excludes information which:

    1.1 is publicly available or becomes publicly available through no act or default of any Party;

    1.2 was in the possession of a Party prior to its disclosure otherwise than as a result of a breach by any party of any obligation of confidentiality to which it is subject;

    1.3 is disclosed to the student by a person which did not acquire the information under an obligation of confidentiality; and

    1.4 is independently acquired by a student and as a result of work carried out by a person to whom no disclosure of such information has been made;

2. No party shall use or disclose confidential information except with the prior written consent of GIBS or in accordance with an order of a court of competent jurisdiction or in order to comply with any law or governmental regulations by which any Party concerned is bound or as may be lawfully requested in writing by any governmental authority.

3. The party undertakes to permanently delete any electronic copies of confidential information received, and destroy any confidential printed documentation or similar material in their possession promptly once they are no longer required, usually on completion of the service contracted by the student.

4. On completion of the contracted service on behalf of the student, the party is to confirm to the student that they are not in possession of any confidential information.

Signed at _____on this _____day of_____20____.

On behalf of:
_____

Name: _____ Signature: _____

duly authorised and warranting such authority

Witness: _____

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APPENDIX 3: INTERVIEWQUESTIONS

Interview Guide for OOH Company and Digital Transformation Expert	
Interviewer:	
Interviewee:	
Designation:	
Date:	
Start time:	
End Time:	
Environment:	
Questions	
Question 1	**Can you tell me a bit about your current role?**
Question 1 Planned Prompts	1. How long have you been in the media industry? 2. How long have you been in the OOH industry?
Question 2	**Can you tell me a bit about your company culture?**
Question 2 Planned Prompts	1. Does the company have a culture of innovation? 2. Does the company support or enable employees with advancement in skills and knowledge? 3. Would you say your company has a vertical or horizontal management structure?
Question 3	**How do you implement strategy?**
Question 3 Planned Prompts	1. Are there departmental strategies in place or an over-arching company strategy? 2. Do you believe strategies have been effectively implemented?
Question 4	**What are the external forces that drive the company's strategy?**
Question 4 Planned Prompts	1. Is the global ecosystem important to the company's strategy? Do you learn from global OOH leaders?
Question 5	**How has the OOH industry positioned itself in the digital ecosystem?**
Question 5 Planned Prompts	1. What and if any role did the leadership of your company play in the transformation of the company to equip it to be within the digital ecosystem?
Question 6	**What and if any new technologies has your company brought about to compete and disrupt?**
Question 6 Planned Prompts	1. How did the company prepare it's people and processes for this change? 2. Looking back, would you have done anything differently? What strategies were put in place?
Question 7	**Is digital transformation important to the company and who are the drivers of it?**
Question 7 Planned Prompts	1. Is there a a strategy in place to manage this? 2. Is there someone or a specific department responsible for driving the transformation.
Question 8	**What parts, products, entities or processes of the company have been transformed?**
Question 8 Planned Prompts	1. Were these adopted or a new innovation? 2. What about the talent? How prepared were they for the changes?
Question 9	**Has the company had any challenges along the way with regards to implemention and enablement of the changes?**
Question 9 Planned Prompts	1. What did you do when you were faced with these challenges? 2. What did the company do when it was faced with these challenges? 3. What could you or the company have done better in the face of these challenges?
Question 10	**Does your company believe digital transformation is important for success?**
Question 10 Planned Prompts	1. Do you believe the company has the right attitude to be successful in the digitally competitive ecosystem?　　2. Do you believe the company has the right strategies in place to be competitive in the digital ecosystem?　　3. Do you believe you are ready to be competitive in the digital ecosystem?
Question 11	**Do you believe that the employees of the company are prepared for the competitiveness of the digital ecosystem?**
Question 11 Planned Prompts	1. If yes, how is this true and what capabilities are in place? 2. If no, what would you do to enable them for competitiveness?
Question 12	**What is the future of OOH? How do you see it?**
Question 12 Planned Prompts	1. Will OOH be sold purely through platforms or will it remain hybrid? 2. What is the future of the workforce, most importantly the sales teams.
END	

APPENDIX 4: ETHICAL CLEARANCE APPROVAL

Figure X: Ethical Clearance Approval
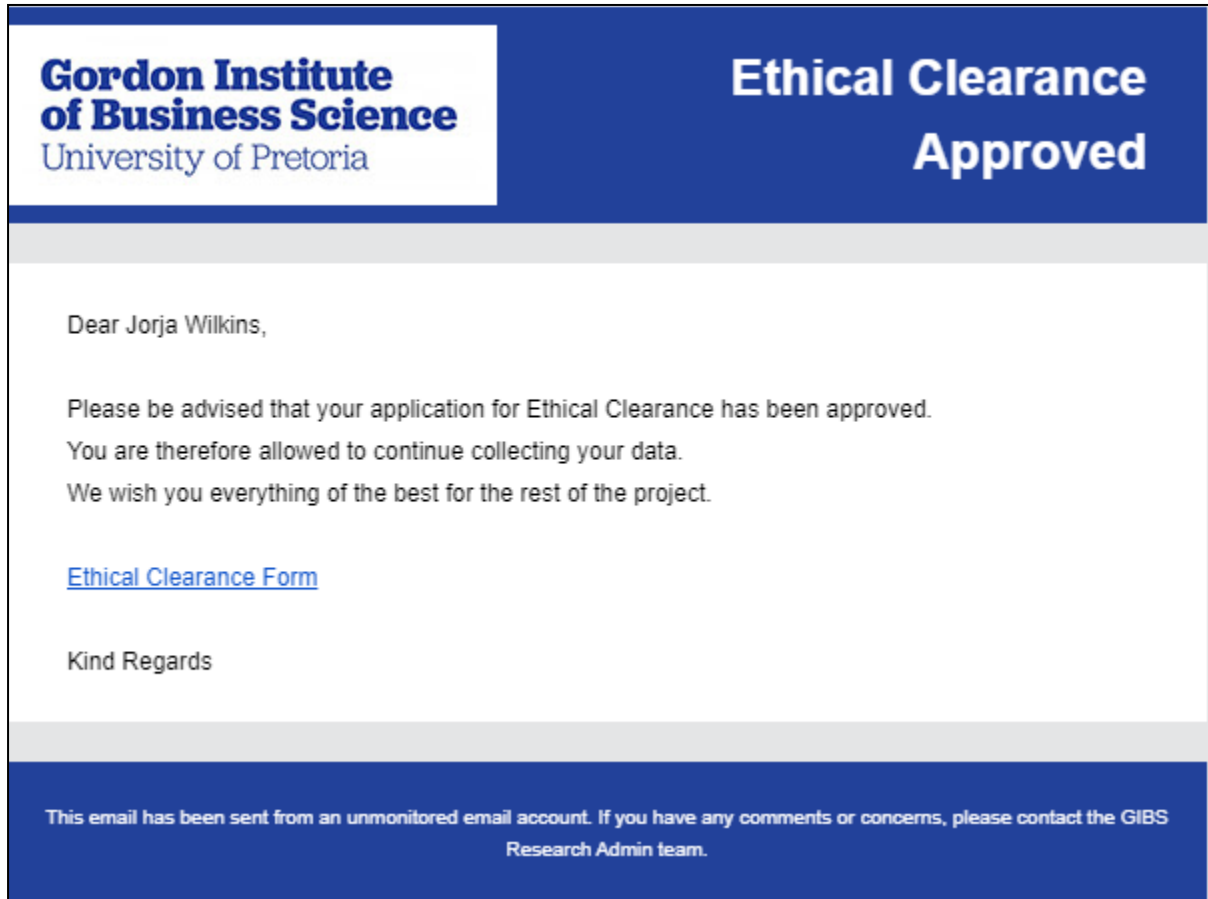
Source: Gordon Institute of Business Science

APPENDIX 5: LIST OF CODES

	Code
•	Barrier: Formal education lacking on digitisation
•	Barrier: Investment in new products difficult in OOH due to costs
•	Barrier: Not enough of the right talent for what is needed
•	Barrier: Opinion and experience is a hindrance
•	Barrier: Resistance to change
•	Barrier: Self education awareness noted
•	Business Strategy: Differentiate from the rest
•	Business Strategy: Broad long-term strategy
•	Business Strategy: Business optimisation
•	Business Strategy: Common goal across the business
•	Business Strategy: Company drives digital transformation
•	Business Strategy: Company relevance important for success
•	Business Strategy: Competitive advantage with culture
•	Business Strategy: Core business change = upskill
•	Business Strategy: Core vs adjacent business model
•	Business Strategy: Defining DT
•	Business Strategy: Deliver high quality standards
•	Business Strategy: digital forward strategy
•	Business Strategy: Digital transformation not main focus
•	Business Strategy: Do the right thing for the business - strategy
•	Business Strategy: entrepreneural firm
•	Business Strategy: Fail fast strategy to move forward
•	Business Strategy: Group support from other companies
•	Business Strategy: In place
•	Business Strategy: Innovation for success
•	Business Strategy: Quantum steps of growth = success
•	Business Strategy: Sales strategy is key for success

●	Business Strategy: Second mover advantage
●	Business Strategy: Strategy is reviewed regularly
●	Business Strategy: Transformation for relevance is the strategy from the company
●	Business Strategy: various Subcultures
●	Business Strategy: Yearly review
●	Business Strategy: Incumbent firm
●	Culture: Accountability
●	Culture: Culture doesnt change people
●	Culture: Family culture
●	Culture: Flexible and agile culture
●	Culture: High performance culture
●	Culture: Innovation is part of DNA
●	Culture: people driven culture
●	Digitisation: Automated processes for efficiency in business
●	Digitisation: Digital expansion success
●	Digitisation: Digital first company
●	Digitisation: Digital product strategy in place
●	Digitisation: Mindset needs to be right to succeed
●	Digitisation: Technology driven company
●	Digitisation: Traditional Media Decline concern
●	Drivers of Strategy: Best in category driver
●	Drivers of Strategy: Client centric strategy
●	Drivers of Strategy: Clients want agility
●	Drivers of Strategy: competition larger firms
●	Drivers of Strategy: Covid-19 influenced change
●	Drivers of Strategy: digital transformation is important
●	Drivers of Strategy: Follow what Group does with Strategy not aware of external forces
●	Drivers of Strategy: Global OOH influence
●	Drivers of Strategy: Incumbent drive strategy in market

•	Drivers of Strategy: Industry alignment
•	Drivers of Strategy: Leaders dictate strategy
•	Drivers of Strategy: Leaders Discuss strategy opportunities
•	Drivers of Strategy: Local competition a concern
•	Drivers of Strategy: Look to SA leaders for information
•	Drivers of Strategy: Market orientated strategy drivers
•	Drivers of Strategy: OOH market share maintained
•	Drivers of Strategy: Regulations issues in OOH
•	Drivers of Strategy: Revenue generation is key for growth
•	Drivers of Strategy: SA can adapt
•	Drivers of Strategy: SA lag behind
•	Drivers of Strategy: Strategy evolves over time
•	Ecosystem: Procurement leading media decisions
•	Ecosystem: SA landscape changing with opportunities
•	Ecosystem: SA limitiations of products
•	Ecosytem: Industry adoption slow
•	Ecosytem: Industry leaders need to drive automation
•	Ecosytem: Industry standard of understanding DOOH
•	Ecosytem: Industry support and standard
•	Enabler: ensure to do the job successfully
•	Enabler: Change happens at cross functional team
•	Enabler: Communication of strategy is key for success
•	Enabler: Digital talent needed
•	Enabler: Formal and informal upskilling of talent
•	Enabler: Framework for success
•	Enabler: Job relevance
•	Enabler: Potential to do more in training and upskilling
•	Enabler: Unlock value
•	Future of OOH: Workforce transition

•	Future of OOH: Workforces are going to be digitised
•	Hire talent for the job
•	Hybrid: Digital positioning important
•	Hybrid: : Platform based future for OOH
•	Hybrid: OOH positioned well for Digital Ecosystem
•	Hybrid: pDOOH integration
•	Leadership: Good leadership drives success
•	Leadership: Horizontal management structure
•	Leadership: Leader can be a hindrance to change
•	Leadership: Leaders filter down knowledge
•	Leadership: Leadership drives the change
•	Leadership: Level of trust important for change
•	Leadership: Vertical management structure
○	NEG Attitude
•	NEG Implementation of Strategy: Implementation could be more structured
•	NEG Implementation of Strategy: No clear digital strategy not labelled
•	NEG Implementation of Strategy: Strategy should be reviewed more
•	NEG Implementation of Strategy: Weak implementation of strategy
•	POS Implementation of Strategy: Framework needs to be in place for change
•	POS Implementation of Strategy: Golden thread of change
•	POS Implementation of Strategy: Implementation must be measured
•	POS Implementation of Strategy: Department Strategies in Place
•	POS Implementation of strategy: Good execution and implementation