
OUT-OF-HOME ADVERTISING MEDIA: THEORETICAL AND INDUSTRY PERSPECTIVES

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ABSTRACT

Out-of-home (OOH) advertising media traditionally have not accounted for a large share of advertising budgets, but overall expenditure has grown considerably in recent years. Due to the transformation of the OOH advertising media landscape, and the diversity and ubiquitous nature of these media, there seem to be a discrepancy between the views of academic and industry experts on exactly what constitutes contemporary OOH advertising media. This article addresses the identified academic-practitioner divide by presenting both sides of the coin. An integrative review of OOH advertising media taxonomies in prominent academic sources, as well as specialists' industry publications from Canada, South Africa, America, Australia, Ireland and the United Kingdom, was conducted. This resulted in a new conceptualisation of four key platforms for a contemporary OOH advertising media classification framework: outdoor advertising, transit media advertising, street-and-retail-furniture advertising, and digital and ambient OOH media. Clear direction for future research was given, specifically testing the proposed conceptualisation, the impact of OOH audience environments and mood on message delivery, and digital OOH advertising as one of the fastest growing media types.

Keywords: Alternative media, Out-of-home advertising media classification, outdoor advertising, transit advertising, street-and-retail-furniture advertising, digital out-of-home advertising, ambient out-of-home advertising

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INTRODUCTION

Just as visual display preceded formal language as the oldest form of communication, outdoor display is probably one of the oldest and most widespread forms of advertising. Out-of-home (OOH) advertising media evolved from humble beginnings as ancient rock art in India (Surhone & Timpledon 2010: 5) and hieroglyphic images advertising the wares of shopkeepers in ancient Egypt (Veloutsou & O'Donnell 2005: 218), to being primarily outdoor advertising or billboards.

Contemporary OOH advertising has evolved from being static outdoor displays next to the road to encompass larger-than-life advertising on walls, buildings or construction sites, moving transit advertising (static media affixed to the outside or inside of moving vehicles, trains, buses or taxis), stationary transit advertising (positioned in the common areas of train stations, taxi ranks, terminals and airports), advertising on public facilities and structures (benches, street poles, elevators, lifts and kiosks), and advertising displayed outside or inside retail and leisure areas such as posters or banners in parking areas, bicycle-rack displays, parking booms and shopping trolleys (Bhargava, Donthu & Caron 1994; Taylor & Franke 2003; Van Meurs & Aristoff 2009; Osborne & Coleman 2008; Baack, Wilson & Till 2008; Shimp 2010; Wilson & Till 2008; Veloutsou & O'Donnell 2005). Digital and unconventional advertising media displayed on objects placed in unexpected contexts such as promotional street art, graffiti and chalk stencils, television screens in taxis, digital screens in sports bars or stadiums, interactive displays in shopping malls, advertising on balloons, bicycles, clothing and tee-markers on a golf course, and bill folders now form part of this class (Gambetti 2010: 34; Shimp 2010: 580; Moriarty, Mitchell & Wells 2012: 365).

The term outdoor advertising has become obsolete and the broader concept OOH advertising media is preferred now (Du Plooy 2012: 132). This is an attempt to do away with external/internal, outdoor/indoor, and in-home/out-of-home dichotomies when identifying and distinguishing between different formats in this class (Gambetti 2010: 38; Muller 2013: 3). Thus, OOH advertising now includes outdoor advertising in the public domain, such as advertising on boards next to a highway; but it also includes other non-domestic OOH advertising – not necessarily outdoor communication – such as advertising at airports, train and subway stations and entertainment or retail venues, such as shopping malls, health clubs, doctors' rooms, public restrooms and restaurants (Gambetti 2010: 37; Wilson & Till 2008: 59).

OOH ADVERTISING MEDIA TRENDS ACROSS THE GLOBE

OOH advertising media has traditionally not accounted for a large proportion of advertising budgets (Taylor 2010: 1). However, overall expenditure has grown

considerably in recent years. Global OOH advertising expenditure was US\$30.4 billion in 2012; it is expected to grow at a faster pace than traditional advertising to US\$38 billion in 2017 (McKinsey 2013: 5). Approximately US\$7.5 billion was spent on OOH advertising media in America in 2012, and it is projected to grow to almost US\$9.6 billion by 2017 (OAAA 2014).

Currently, OOH advertising media represents a significant part of the overall share of advertising expenditure of countries such as South Korea with 20.3%, and Singapore and Japan with 14% each. This is also the case for Central and Eastern Europe (Ukraine with 16.2%, Slovenia with 12.8%, Bulgaria with 12.5%, Hungary with 12.7%), as well as Western Europe (France with 11.4%, Portugal with 11.2%) (Muller 2013: 4). The drastic increase in the popularity of OOH advertising media in emerging markets is notable in the relative share of the medium, e.g. Russia with 17.7%, China and Japan with some 14% each, and Mexico with 9.5%. OOH advertising media in Russia, since their inclusion in the free market system, has increased exponentially. Large outdoor advertising formats, in particular, are being encouraged because these are regarded as an indication of prosperity in this country (Lopez-Pumarejo & Myles 2009: 35). In Nigeria, OOH advertising represents 30.6% of the country's total advertising expenditure, which is probably due to the relatively restricted access to print and television media (Muller 2013:7).

Not only has the attractiveness of OOH advertising media increased globally, it has also entered the digital era. Globally, digital OOH advertising is one of the fastest growing media types due to its expansion into new venues and markets, innovation, enhanced features and the integration of mobile and social media. Globally, digital OOH advertising media expanded at a compound annual growth rate of 13.7% from 2006 to 2011. America remains the largest global market with an annual revenue of US\$2.05 billion and a growth rate of 11.2% in 2011. The second largest market is China, at US\$1.44 billion, increasing at a rate of 39.2%. Third is the United Kingdom with US\$549 million, up 11.3%, followed by Brazil with US\$155 million and a growth rate of 38% (PQ media 2014).

This type of advertising is more effective for content and advertising delivery because it allows advertisers to customise their messages to location, circumstance, time of day, and day of week. This digital technology also offers creative and interactive opportunities, such as the display of full motion video and the inclusion of animation, so that, in effect, television commercials are shown outdoors. The latest technology employed in these full colour and large format electronic signs provides superb levels of brightness and resolution on LEDs so that daily news and weather updates and relevant information can be displayed to stimulate audience interest (Müller *et al.* 2009: 6).

Consumers are now able to interact with digital OOH advertising using their mobile or smart phones, thus combining two of the fastest growing advertising mediums in the world (PQ media 2014). Combining location-based mobile media and digital OOH advertising using digital coupons, branded content, games, smart phone applications, call to action via SMS, sweepstakes, competitions and promotions, mobile internet sites and social interaction via mobile can increase engagement with consumers and will be more effective in persuading them to buy products (Lasinger & Bauer 2013: 162).

More innovative technological developments are constantly being tested and applied; for instance, “intelligent billboards” that detect the radiation from vehicle antennas determine the most popular radio station and adjust their messages to suit the drivers passing by. Then there are “oscillating billboards” on top of buses that adjust messages as the bus drives from one location to another; and “sound-enabled billboards” that are equipped with a motion-sensitive infrared device that can launch a recorded message, thereby strengthening the outdoor advertisement (Lichtenthal, Yadav & Donthu 2006: 246). Digital screens are also opening up the opportunity to run more creative and noticeable advertising. Technology that can link a poster to a mobile phone and can recognise passersby is being tested. Thus, it will be possible to carry advertising, content, promotions and social media activity from the internet into public spaces via poster-to-mobile campaigns (Kinetics 2011: 5).

It is expected that the OOH advertising media sector will continue to grow and diversify over the next few decades, not only because of its cost-effectiveness, but also because it seems to be the only available realm from which to reach progressively elusive consumers. Furthermore, it is the ideal anchor for integrated marketing communication (IMC) campaigns (Lopez-Pumarejo & Myles 2009: 38).

RESEARCH RATIONALE

There seem to be some disagreement in the academic literature (Belch & Belch 2012: 449; Duncan 2005: 376; Gambetti 2010: 36; Koekemoer 2014: 209; Lane, King & Reichert, 2011: 359; O’Guinn, Allen & Semenik 2000: 507; Shimp 2003: 356; Sissors & Baron 2010: 441; Yeshin 2006: 328) and industry publications on exactly what constitutes contemporary OOH advertising media (OMAC 2014; OHMSA 2014; OAAA 2014; OMA Australia 2014; OMA Ireland 2014; OMANZ 2014; OMC 2014). Previous studies published on OOH advertising media focussed mainly on the effectiveness of specific types in this media class (Bhargava *et al.* 1994; Taylor & Franke 2003; Van Meurs & Aristoff 2009; Osborne & Coleman 2008; Baack *et al.* 2008; Wilson & Till 2008; Veloutsou & O’Donnell 2005). None of these studies offer

a systematic basis for classification or conceptualisation of all the major OOH advertising media platforms and options in this class.

When considering the views of prominent academics in advertising and marketing communication it becomes clear that some of them only focus on traditional OOH advertising or billboards in the roadside environment (O'Guinn *et al.* 2000: 507), disregarding the other more contemporary formats, such as those at airports, public transport waiting areas, minibus taxi ranks, pedestrian routes, shopping malls and leisure environments. Several authors seem to realise that transit advertising is also part of OOH advertising media (Koekemoer 2014: 209; Shimp 2003: 356; Yeshin 2006: 328), while others include some indoor marketing communication such as sales promotions, in-store radio, cinema advertising and product placement as part of this class (Gambetti 2010: 36; Duncan 2005: 376). Only a few sources acknowledge, as with other media, that OOH advertising media is now entering the digital era (Belch & Belch 2012: 449; Lane *et al.* 2011: 359; Sissors & Baron 2010: 441), thereby ignoring the latest developments in the field (Cheng & Chen 2014: 53).

The industry seems to adopt a more inclusive approach by including a far wider variety of options in OOH advertising media (OMAC 2014; OHMSA 2014; OAAA 2014; OMA Australia 2014; OMA Ireland 2014; OMANZ 2014; OMC 2014). However, the different classification criteria and schemes used by the industry still does not offer a clear answer to the question of exactly what constitutes contemporary OOH advertising media. Given the above context, the problem statement is summarised as follows:

Due to the rapid development of the OOH advertising media landscape, there is disagreement between academics and the industry on the classification of OOH advertising media. There is no accepted basis for the classification of OOH advertising media, indicating exactly what constitutes contemporary OOH advertising media platforms.

Without such a classification system, there is no orderly, integrated basis to describe and research this advertising medium, neither is there a complete understanding of the wide range of contemporary OOH advertising media options. The practical implications are that measurement of the total OOH advertising media spend will not represent all the types and the resultant data will not be relevant to marketers and media decision makers. Furthermore, advertisers might not be aware of all the contemporary options available to reach very specific market segments at a variety of places, such as at shopping malls, golf courses, outdoor squares, festivals and events, access routes to shopping malls and stores, health clubs, beaches, schools, public restrooms, doctors' waiting rooms, sports stadia and arenas; thus, these opportunities will not be fully exploited.

Addressing the differences between the perspectives of academics and the industry with regards to OOH advertising media is valuable, since closing the academic/industry divide remains a concern. Rossiter and Percy (2013: 391) warn that in recent years there has been a significant worsening of the academic/industry divide, which has seen academics continuing to ignore practitioners' views and research which appear in trade publications and practitioner-oriented journals. An investigation of this nature is vital in view of the alleged gap between the knowledge that is created by marketing academics and that which is regarded as useful by practitioners (Tapp 2004: 579). Academics certainly regard the integration of marketing theory and practice as both valuable and necessary, and believe that it is they who should drive marketing knowledge forward. Considering the academic as well as industry perspective on OOH advertising media can result in a useful basis for the classification and research of all the new advertising options within this class.

RESEARCH QUESTION, OBJECTIVES AND METHOD

In light of the above, the primary objective of this article is to answer the following research question: How do academic and industry perspectives on OOH advertising media compare and which media platforms should form the basis of a contemporary OOH advertising media classification framework?

The secondary objectives of this article are two-fold, namely to compare academic and industry perspectives on OOH advertising media and to identify and compare the major OOH advertising media platforms.

Research method

An integrative review of academic literature and industry sources was conducted to analyse both perspectives and to identify commonalities that can be used as the basis for potential reconceptualisation of a contemporary OOH advertising media classification framework. An integrative review is a form of research that reviews, critiques, and synthesises representative literature on a topic in an integrated way such that new frameworks and perspectives on the topic are generated (Torraco 2005: 356). Similarly, Hart (2001: 3) notes that it serves as an evaluative summary of the focal work in a given field of interest and has an organisational pattern that combines both summary and synthesis, often within specific conceptual categories. Thus, analysing the literature on OOH advertising media types can have as much intellectual and practical value as primary data collection.

Renowned international journals (*Journal of advertising research*, *Journal of current issues and research in advertising*, *Journal of advertising*, *International journal of advertising*) regarded to be key sources of research in advertising media

(Cheong & Kim 2012: 323) were examined to find a taxonomy or conceptual classification of OOH advertising media types. It appears that the articles in these journals examined the effectiveness of specific OOH advertising media types, such as outdoor advertising boards and posters (Bhargava *et al.* 1994; Taylor & Franke 2003; Van Meurs & Aristoff 2009), digital OOH advertising (Osborne & Coleman 2008), airport advertising media (Baack *et al.* 2008; Wilson & Till 2008) and taxi advertising media (Veloutsou & O'Donnell 2005), but no encompassing or comprehensive classification of OOH platforms seems to exist. Due to the lack of journal articles classifying contemporary OOH advertising media types, the classifications and taxonomies found in some of the most prominent textbooks on advertising and marketing communication published during the past decade were consequently examined (Belch & Belch 2012: 578; Du Plessis *et al.* 2010: 107; Duncan 2005: 372; Koekemoer 2014: 209; Lane *et al.* 2011: 359; Moriarty *et al.* 2012: 364; O'Guinn *et al.* 2000: 507; Shimp, 2003: 356; Sissors & Baron 2010: 441; Wells *et al.* 2006: 227; Yeshin 2006: 328).

Thereafter, the industry perspective on this wide variety of media types was considered, examining the official websites of prominent OOH advertising media associations listed by FEPE (Federation European Publicite Exterieur). These organisations are the officially recognised trade associations for the OOH advertising media industry in the respective countries. They connect the major role players in this industry and typically represent the bulk of industry revenue (FEPE International 2014). Only the official websites of members with an English classification of the different media formats were reviewed, in particular the Out-of-Home Marketing Association of Canada (OMAC 2014), Out-of-Home Media Association of South Africa (OHMSA 2014), Outdoor Media Association of America (OAAA 2014), Outdoor Media Association of Australia (OMA Australia 2014), Outdoor Media Association of Ireland (OMA Ireland 2014), Outdoor Media Association of New Zealand (OMANZ 2014) and Outdoor Media Centre of the United Kingdom (OMC 2014).

Sources from both these perspectives were reviewed and compared to offer an academic and industry perspective on OOH advertising media. Then, a new conceptualisation of the basis of an OOH advertising media classification framework was proposed derived from this critical analysis and synthesis.

OBJECTIVE 1: COMPARE ACADEMIC AND INDUSTRY PERSPECTIVES ON OOH ADVERTISING MEDIA

Academics' perspective on OOH advertising media

When considering the academic perspective on OOH advertising media as seen in table 1, it is apparent that the major OOH advertising media platforms grew from mainly being outdoor advertising in the past, to now include a variety of

alternative or non-traditional options, such as transit advertising media as well as street-and-retail-furniture advertising (Duncan 2005: 372; Lane *et al.* 2011: 359; Moriarty *et al.* 2012: 364; O'Guinn 2000: 507; Shimp 2010: 578). More recently, a variety of digital OOH advertising options have also been introduced and have become one of the fastest-growing areas within this sector (Gambetti 2010: 35). OOH advertising media are entering the digital era with digital screens to reach out to consumers anytime and anywhere in physical space.

Some of these sources have followed an extended view of OOH advertising media to include a wide variety of non-traditional media or alternative communication channels (Duncan 2005: 376; Moriarty *et al.* 2012: 364) not considered by others to form part of this class (Belch & Belch 2012: 568; Lane *et al.* 2011: 359; O'Guinn *et al.* 2000: 507; Shimp 2003: 356; Sissors & Baron 2010: 441; Wells *et al.* 2006: 227; Yeshin 2006: 328). For example, Duncan (2005: 376) considers options such as cinema and video advertising, kiosks with electronic advertising, banner displays on ATMs, advertising in elevators, advertising on shopping trolleys, and even product placement part of OOH advertising media. Koekemoer (2014: 209) regards outdoor advertising and cinema advertising as OOH advertising media, since consumers need to be away from home for exposure to both these media types. However he does not take into account the unavoidable nature of OOH advertising because it cannot be turned off. This allows advertisers to break through the barrier to advertising consent because OOH advertising is placed in the out-of-home environment where its power of intrusion does not require the explicit consent of the consumer in order to make an impact. In the case of movies in cinemas, they must be consciously selected and attended before viewing of the advertising message can take place.

Moriarty *et al.* (2012: 364) include on-premise or retail signs on the premises of businesses, restaurants or shopping centres to identify their type of business or store location. They argue that on-premise or retail signs can either be simple, to identify an outlet, such as the McDonald's signs; or they can be more complex in order to perform similar functions to what billboards do, such as the large illuminated and even animated or digital signs in Las Vegas. Shimp (2010: 578) disagrees and clearly distinguishes between on-premise signage and off-premise advertising. This view seems to be more appropriate since only off-premise advertising is typically used by third-party advertisers in an attempt to influence consumers' store or brand selection decisions, while on-premise signage or branding is used by retailers or business for identification purposes and not rented as media space to advertisers.

**TABLE 1: AN ACADEMIC PERSPECTIVE ON
OOH ADVERTISING MEDIA**

Major OOH platforms included in classification of OOH advertising media	Outdoor	Transit media	Street and retail furniture	Digital OOH channels	Additional media/ types added
O'Guinn <i>et al.</i> (2000: 507)	☒				
Shimp (2003: 356)	☒	☒			
Duncan (2005: 372)	☒	☒			Cinema/video advertising, electronic kiosks, banners displays on ATMs, advertising on elevators, advertising on shopping trolleys, product placement
Yeshin (2006: 328)	☒	☒			
Wells <i>et al.</i> (2006: 227)	☒	☒		☒	
Du Plessis <i>et al.</i> (2010: 107)	☒	☒			
Sissors & Baron (2010: 441)	☒	☒		☒	
Lane <i>et al.</i> (2011: 359)	☒	☒	☒	☒	
Moriarty <i>et al.</i> (2012: 364)	☒	☒			On-premise signs
Belch & Belch (2012: 578-568)	☒	☒	☒	☒	
Koekemoer (2014: 209)	☒				Cinema advertising

Industry perspectives on OOH advertising media

The increasing variety of OOH advertising media types are confirmed when considering the industry perspectives, as represented by prominent international OOH advertising media trade associations in table 2. Compared to the academic viewpoint, the major OOH advertising media industry associations seem to be leading the way with their inclusion of even a wider variety of non-conventional OOH advertising media types (OMAC 2014; OHMSA 2014; OAAA 2014; OMC 2014). While static outdoor advertising signs might once have dominated OOH advertising media, advertisers now are offered a wide variety of new options. In their classification of OOH advertising media, these associations include options such as sport stadium advertising and promotions, sales promotion at shopping malls, inside stores or targeting commuters, electronic outdoor advertising, airborne or waterborne advertising on aeroplanes and boats, advertising on flags, giant advertising balloons or blimps, and advertising at gymnasiums and petrol stations. Furthermore, traditional static outdoor advertising signs are increasingly giving way to digital screens, which can display video and animated advertisements.

Nowadays digital media are used to entertain and inform minibus taxi commuters in South Africa. A transit media company, Provantage, recently introduced large plasma screens inside taxis with bluetooth technology to broadcast tailor-made programmes with the opportunity of advertising and the sponsorship of regular features (Provantage 2010). Another company, Comutanet, offers large television screens that are strategically placed at the largest taxi ranks in South Africa. These types of media are ideal for regional advertisers, or to allow national advertisers to customise their message. They offer an entertaining audio-visual medium; they also create a sense of community when commuters gather to watch the large screen, for example, during major sports events (Comutanet 2011).

The industry appears to employ different classification criteria. In order to understand the reason behind the classification, the method or criteria used should be taken into account. Some trade associations classify OOH advertising media types based primarily on media format (OHMSA 2014; OAAA 2014; OMA Ireland 2014; OMANZ 2014), while others classify OOH advertising types based on the audience environments where the media are placed (OHMSA 2014; OMA Australia 2014; OMAC 2014; OMC 2014). Using different classification criteria has implications for advertisers when planning their marketing communication strategies. When using media format as classification criterion, a signboard or a billboard would be classified as outdoor advertising regardless of whether it is located next to a road aimed at vehicular traffic, or at a train station aimed at commuters, or at the entrance of a shopping mall aimed at shoppers. For example, billboards next to the road aimed at vehicular traffic, those located inside a parking

area at a shopping mall, and advertising located inside airports or at railway stations will all be categorised as outdoor advertising signs. When using the OOH audience environments as the basis for classification, an advertising board would be classified depending on the primary audience reached. Thus, the type of OOH audience environment where it is located and not the type of media format used is the primary criterion. Therefore, a billboard next to the road, reaching vehicular traffic, would be classified as roadside media. A board located inside a parking area at a shopping mall reaching shoppers will be regarded as retail media. Boards inside a train station or airport reaching daily commuters will be categorised as transit advertising.

**TABLE 2: AN INDUSTRY PERSPECTIVE ON
OOH ADVERTISING MEDIA**

Major OOH platforms included in classification of OOH advertising media	Outdoor	Transit media	Street and retail furniture	Digital OOH channels	Additional media/types added
Out-of-home Marketing Association of Canada (OMAC 2014)	☒	☒	☒	☒	Place-based/ venue advertising
Out-of-Home Media Association of South Africa (OHMSA 2014)	☒	☒	☒	☒	Activations/ sales promotion
Outdoor Media Association of America (OAAA 2014)	☒	☒	☒	☒	Cinema advertising
Outdoor Media Association of Australia (OMA Australia 2014)	☒	☒	☒	☒	
The Outdoor Media Association of Ireland (OMA Ireland 2014)	☒	☒	☒	☒	
The Outdoor Media Association of New Zealand (OMANZ 2014)	☒	☒	☒	☒	
Outdoor Media Centre of the United Kingdom (OMC 2014)	☒	☒	☒	☒	Cinema advertising

This option of considering the OOH audience environment as the primary classification criterion seems to be more marketing-oriented, given that the focus is on the potential target market reached in the OOH media environment where

the advertising message is placed, rather than simply considering the physical features of the media formats or types. Advertising in the roadside environment, using billboards located on key arterial routes and busy urban streets can be used to reach major markets. Advertising in the transit environment allows effective geo-demographic targeting in order to reach certain transport-user groups with similar buying patterns. Advertising in retail and leisure environments can deliver a message to shoppers by placing it at a specific place or location. For example, university campuses or medical clinics could reach a more specifically targeted profile, such as students or people likely to consider pharmaceutical or health-related advertising. This should be done in order to draw attention where consumers are most likely to be interested in the visual message, creating a desire, and ultimately moving the exposed consumers towards action to buy the advertised product, according to the stimulus response view of the AIDA advertising model (Duncan 2005: 183).

As such the persuasive aspect of the visual message should be highlighted, irrespective of the product or service advertised. In other words, the message should be adapted to best suit the OOH advertising media in order to reach and influence as many of the target audience as possible. Media planners should realise that OOH advertising media platforms are not necessarily located at the point of purchase or point of sale within a store. Therefore, it needs to motivate and/or create a desire to want the product or service advertised, and reinforce and remind the target market across the different phases of the decision-making process.

OBJECTIVE 2: IDENTIFY AND COMPARE THE MAJOR OOH ADVERTISING MEDIA PLATFORMS

From the above discussion it is clear that academics and OOH advertising media practitioners disagree on the inclusion of certain communication elements, such as sales promotions, cinema, on-premise signs and a variety of new alternative outdoor communication options, as OOH media. There is also a tendency in the industry to include non-conventional contemporary formats, such as digital and a range of ambient communication channels. Despite the different ways of approaching the classification, and some differences on exactly what constitutes OOH advertising media, academics and the advertising media industry agree on the vast range of indoor and outdoor formats that can be placed in a variety of environments. In spite of the differences between these two groups, most sources seem to be in agreement on the inclusion of outdoor advertising, street-and-retail-furniture advertising, transit media advertising, and more recently, digital and ambient OOH advertising media as part of this class. Therefore, all four these major media platforms should be considered as part of the OOH advertising media class.

Evolution of OOH advertising media

OOH advertising media evolved from being mainly outdoor advertising (on the left of figure 1) to include other contemporary platforms (moving to the right of figure 1). Each of these platforms continue to develop and expand. Outdoor advertising has evolved from mostly free-standing outdoor advertising boards next to highways to include super large formats, such as gantries across roads, murals and massive buildings wrapped in advertisements. Transit advertising options now range from those that are ideal for reaching consumers in low-income and middle-income groups, such as advertising on buses, minibus taxis and metro trains, to the expansive range of opportunities catering for high LSM groups, such as airport media, branded upmarket cabs in major metropolitan areas, water taxis at the Cape Town Waterfront, private car branding, and the Gautrain. Street-and-retail furniture advertising can now be found in suburban areas, as well as in shopping environments (Du Plooy 2012: 331). This allows advertisers far more targeted reach to pedestrians and shoppers. Digital media at airports, at retailers and in shopping centres facilitate dynamic communication content and consumer engagement. Ambient OOH media allow advertisers to reach consumers in unconventional places, and to attract attention by using them at unexpected times, but also in specific contexts and environments. Thus, OOH advertising media can no longer be regarded as a homogeneous sector sharing the same key characteristics, benefits and limitations as outdoor advertising media, as suggested by some sources (Moriarty *et al.* 2012: 369; Lane *et al.* 2011: 359).

OOH audience

The four major platforms can reach OOH audiences in different environments. Outdoor advertising media are primarily for vehicular traffic. Transit media advertising reach commuters in transit. Street-and-retail-furniture advertising media reach pedestrians and shoppers in retail-and-leisure environments. The unique features of digital OOH advertising can be used to attract the attention of consumers who are in transit or at commercial locations by displaying customised messages, including animation, audio and video in the content, placing the screens at highly visible locations, and incorporating colourful and interesting content and different types of content such as news, weather or entertainment (Müller *et al.* 2009: 6). Digital OOH advertising screens in shopping malls also affect consumer perceptions about the brand names displayed and can enhance their image, leading to a more modern perception, entertaining customers and improving sales (Newman *et al.* 2010: 6). Alternative OOH advertising media target certain audience profiles where particular groups congregate for a specific purpose, such as at doctors' rooms, public health clinics, shopping malls, restaurants, night clubs, classrooms, golf courses, and sport and cultural events.

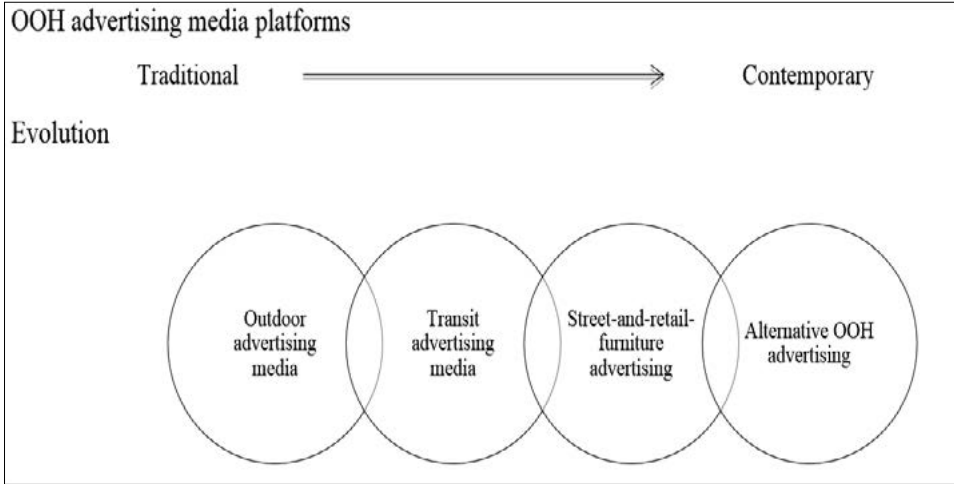


FIGURE 1: A COMPARISON OF THE MAJOR OOH ADVERTISING MEDIA PLATFORMS

OOH audience				
Type of OOH audiences	Vehicular traffic	Commuters	Pedestrians/ shoppers	Specific targets
Extent of market coverage	Broad mass markets			Narrow/niche markets
OOH advertising media environment				
Type of OOH environments	Roadside	Transit	Retail/Leisure	Various locations - Mostly indoors
Potential dwelling time	Limited			Extended
Ability for interaction/ engagement	Low			High

With the wide range of contemporary OOH advertising media options available now, advertisers are able to reach far more targeted audiences in specific environments throughout their daily routines. For example, public transit advertising and minibus-taxi advertising media can reach a captive mass market travelling back and forth to major metropolitan areas on a daily basis. Private car branding, where car owners’ lifestyles are matched to the target market of the product or service being advertised, could be employed as a brand-touch point – with specific audience profiles, such as students on campus, mothers with children in a school in a specific neighbourhood, or holidaymakers at a beach town during high season. Alternative OOH advertising can be employed as an additional

brand-contact point, or when the advertisers have a limited budget available. Digital OOH advertising media with customised content can be placed indoors where it can be seen by specific audiences, whether this is business professionals waiting to catch a flight in the morning, shoppers waiting in line at the grocery store in the afternoon, or people spending time with friends at a bar or restaurant in the evening. Digital interactive capabilities are ideal in this context because they allow for interaction with the target audience, such as via cellular telephones, short-text messages (SMS) and QR (Quick Response) codes. This makes this medium more engaging for consumers while allowing advertisers to provide relevant customised content, instead of only one-way static advertising messages.

OOH advertising media environment

Advertising and media practitioners can no longer simply consider the physical features of the media formats or types. OOH audience environments should be a primary consideration. OOH advertising messages placed on different formats should be suitable for the environment where the audience is exposed to messages to maximise the effectiveness. The roadside environment where the message is aimed at fast-moving traffic results in limited dwelling time and thus requires short copy and a limited number of high-impact visual cues. Environments with a captive audience, such as people waiting at business lounges at airports, in doctors' rooms and in retail stores typically result in more time being available for people to notice and be discerning about their surroundings. These OOH environments result in longer dwelling times, and they allow advertisers to interact or engage with their target audience.

Contemporary OOH advertising in its many shapes and formats can be employed effectively as brand-touch points in an urban or rural environment in a way that is generally less expensive and more cost-efficient than highly fragmented traditional mass advertising media. It could, in fact, serve as the ideal brand-touch point with a target audience in a variety of OOH environments by enhancing their relationship and experience with the brand and offering them information, entertainment and distraction (Du Plooy 2012: 313). OOH advertising media can now be used to target selected market segments with specific messages or themes at a time and place where they are mostly likely to be interested. For example, a digital sign at a tourist information centre can make tourists aware of the daily tours in the area, an advertisement at the bus station can remind commuters to buy their morning newspaper, or an advertisement inside a maternity clinic can inform prospective mothers about the vaccinations recommended during pregnancy.

However, the surrounding clutter and competing stimuli in the OOH advertising media environment can distract the audience. This can be an overcrowded entrance to a shopping mall, competing outdoor advertising boards in a township

environment, or too many passengers converging at certain locations in an airport. Therefore, when designing OOH advertising media or messages the following aspects should be considered carefully: the level of message involvement of the audience, the distracting clutter in the environment, the amount of dwelling time in different OOH environments, the exact locations of the advertising media vehicles, activities or frame-of-mind of the target audience, size and shapes of the advertising media vehicles, as well as the themes, number of words and size of text used in the message copy (Donthu, Cherian & Bhargava 1993; Van Meurs & Aristoff 2009; Veloutsou & O'Donnell 2005; Wilson & Till 2008).

MANAGERIAL IMPLICATIONS AND CONCLUSIONS

This article has implications for practitioners, as well as academics. Academics should not remain overly attached to original or traditional outdoor advertising media at the expense of contemporary OOH advertising media options, such as digital and ambient OOH media. They should rather follow the lead of experts in the industry to embrace this wide range of platforms and formats.

Digital OOH advertising media allow for the real-time adaptation of advertisements, supported or automated by information systems. Contemporary digital OOH advertising will only be successful if placed in environments which allow enough dwelling time for the necessary interaction. Environments with a captive audience, such as people waiting at train stations, business lounges at airports, bus stops, taxi ranks, as well as inside transit-media vehicles typically result in more time being available for people to notice and be discerning about their surroundings. These OOH environments result in longer dwelling times, and they allow advertisers to obtain interaction or engagement with a target audience by using detailed entertaining copy (Wilson & Till 2008) and combining it with mobile devices (Lasinger & Bauer 2013: 162). Roadside environments, where the message is aimed at fast-moving traffic, result in limited dwelling time and require short copy and a limited number of high-impact visual cues (Van Meurs & Aristoff 2009).

Furthermore, the frame of mind or mood of the target audience in the specific environment will influence their responsiveness. Locations outside the home introduce the element of mood. The audience can be tired, irritable, preoccupied, or conversely, particularly alert and susceptible for relevant messages during certain times of the day. For example, shoppers browsing in shopping malls are likely to react to persuasive messages advertising fashion brands. A captive market, such as minibus-taxi commuters, would probably be receptive to valuable information on relevant products advertised on large plasma television screens inside taxis, with bluetooth technology to broadcast tailor-made programmes. A driver stuck on a highway on the way to work might not pay attention to a message on an outdoor advertising board for a new movie or alcohol brand. However, while on their way

back home, when seeing an advertisement for a hamburger or when driving past a fast food outlet, this might catch the attention of the now-hungry driver.

By analysing and monitoring a target audience's movements (walking, driving a private car, using public transport) across different environments advertisers can use a combination of OOH advertising media options to create a well-timed, targeted OOH advertising media campaign.

The changing nature of OOH advertising requires advertisers and their agencies to reconsider their manner of media planning. Their aim should no longer be to merely obtain maximum exposure or to deliver the message to a mass audience. It should rather be to deliver quality media exposure to a specific OOH audience segment. This can be achieved by selecting the most visually impactful, relevant and preferred OOH brand contact points in the most suitable OOH environments to connect with the target audience, whenever and wherever they are most receptive.

This study identifies several opportunities for future research. The lack of any proper classification framework for the whole new range of OOH advertising media options should be addressed by testing a new framework consisting of the major media platforms: outdoor advertising, transit media advertising, street-and-retail-furniture advertising, and alternative OOH advertising as identified.

Marketing scholars and academic institutions should examine the wide range of contemporary OOH advertising media options. Another worthwhile future research agenda would be to consider OOH audience environments and the mind-set of the audience in which the advertising message is delivered from a consumer's perspective. For example, a comparison could be made between high-distraction and low-distraction environments using similar advertisements. In light of the exponential growth of digital OOH advertising media it will be valuable to determine consumers' attitudes towards this medium, as well as their propensity to interact with it.

Furthermore, experimental research is needed to compare digital OOH advertising media to traditional outdoor advertising concerning advertising effects. For example, it could determine whether the highly colourful, customised messages and animation of digital OOH advertising are more effective than large static displays, or whether consumers perceive these as intrusive.

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