



How Digital Out-of-Home Contributes to Traditional
Out-of-Home Advertising: An Exploratory Study
from the Perspective of Irish Industry Practitioners.

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Abstract

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This paper considers the phenomenon of digital out-of-home advertising as a relatively new advertising medium and how it contributes to traditional out-of-home advertising. Academics thus far have conducted studies focused on the responses of consumers to digital out-of-home advertising. So, for this reason, the purpose of the study was to explore the opinions of industry practitioners regarding digital out-of-home advertising, as to the challenges they face when planning the format into out-of-home advertising campaigns as well as how they influence advertisers to incorporate digital out-of-home into their out-of-home advertising campaigns.

The literature reviewed highlights important areas to examine when considering digital out-of-home as a media channel in out-of-home advertising campaigns. A qualitative method was adopted for this study and the data was collected through in-depth interviews with practitioners from both out-of-home advertising media-specialist agencies and leading media-only agencies. Through analysis of the findings and the literature, it has enabled this study to build a more comprehensive overview into the role that digital out-of-home occupies in the out-of-home industry.

By investigating the perspectives and practices of knowledgeable practitioners, this study has highlighted the innovative ways they guide advertisers to utilise digital out-of-home to its full potential, therefore positively adding value to their traditional out-of-home advertising campaigns. This research should also add to the body of knowledge surrounding the phenomenon of digital out-of-home advertising. The scope for further research on digital out-of-home as an integral part of out-of-home advertising is validated as a result of the analysis completed in this study.

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Chapter 1: Introduction

1.1 Introduction to the Research Area

1.1.1 The Changing Out-of-Home Industry

Outdoor advertising is considered the oldest form of advertising (Myers, 1999; Iveson, 2012; Shimp and Andrews, 2013; Roux and Van der Waldt, 2014; Bostina-Bratu *et al.*, 2018), dating back to 1450 when Gutenberg invented movable type printing (OAAA, 2018). By 1796, the illustrated poster was created after the lithographic process had been perfected (*ibid*). In an attempt to broaden the concept of outdoor advertising, the term ‘out-of-home’ advertising media is now favoured (Roux and Van der Waldt, 2014) to include outdoor advertising formats in the public domain, such as billboards, but also other “*non-domestic out-of-home advertising*” (Roux and Van der Waldt, 2014, p. 96), such as advertising in airports, train stations, shopping malls and stores (Gambetti, 2010). Classified as a “*major medium*” alongside television, radio, newspapers, cinema and the internet (Taylor *et al.*, 2006, p. 21), out-of-home advertising continues to occupy a fundamental part of integrated marketing communication (IMC) campaigns (Muller, 2013). It is due to its great adaptation power that this ancient means of communication with the masses (Roux and Van der Waldt, 2014; Bostina-Bratu *et al.*, 2018) has managed to survive until today. The result of developing technologies has been that the out-of-home industry has witnessed a rapid expansion in digital inventory – i.e. screens in public spaces that can be controlled independently by a centralised computer server (Burke, 2009) and are primarily used for advertising (Dennis *et al.*, 2010; Bauer and Lasinger, 2014; SCALA, 2017).

1.1.2 The Growth of Digital Out-of-Home

Digital out-of-home advertising is rapidly emerging as a marketing channel that promises to reach out to consumers at any time and any place in physical space (Bauer and Lasinger, 2014), becoming an important new channel for communicating with consumers (Burke,

2009). According to PML Group (2017) “*Digital is the biggest development in the out-of-home industry in recent times, if not of all time. It’s a fundamental change to how out-of-home looks, performs and is traded*”. Therefore, the changing nature of out-of-home advertising requires that both advertisers and their agencies reconsider their approach to out-of-home campaign planning (Roux and Van der Waladt, 2014), so as to better understand what their objectives should be, and how to strengthen out-of-home as an advertising medium.

1.2 Background and Need

The topic of digital out-of-home advertising particularly interests the researcher who has over 3 years’ marketing experience working for an Irish out-of-home media owner, who have heavily invested in multiple digital out-of-home networks in the past eighteen months. Digital out-of-home is revolutionising the face of out-of-home advertising (Ocean Outdoor, 2016). There has been significant investment in digital out-of-home networks by Irish media owners in 2017 (Core, 2018), therefore changing the out-of-home offerings available to advertisers. Digital networks are expected to account for 18% of all out-of-home spend in the Republic of Ireland by the end of 2018, up from 15% in 2017 (Adworld, 2018). Therefore, with the multitude of new opportunities that digital out-of-home has to offer (Bold, 2008), there is a need to understand how this contributes to traditional out-of-home advertising.

1.3 Aim of the Study

This study aims to explore the perspectives of industry practitioners so as to better understand digital out-of-home advertising and its role in out-of-home advertising campaigns. The main research question asks; *How does digital out-of-home advertising contribute to traditional out-of-home advertising?*

Three core objectives have been established that will look to enlighten the research question:

- (1) To assess the opinions of industry practitioners of digital out-of-home advertising in comparison to traditional out-of-home advertising.
- (2) To understand the challenges faced by industry practitioners when planning digital out-of-home in out-of-home advertising campaigns.
- (3) To identify how industry practitioners influence advertisers to incorporate digital out-of-home into out-of-home advertising campaigns.

There is a definite feeling of excitement relating to digital out-of-home as it helps to transform the out-of-home industry (Franch *et al.*, 2013; Fisher, 2017) and consequently, dramatically changing what out-of-home advertising can offer to advertisers with the inclusion of its unique features (Muller *et al.*, 2009). The challenges reveal the problems faced by practitioners when planning digital out-of-home in out-of-home campaigns. Observing how practitioners encourage the use of digital out-of-home in out-of-home advertising campaigns also serves to underpin the most important features of the format, and consequently, evidences how it contributes to traditional out-of-home advertising.

The research is conducted qualitatively through in-depth interviews that are anticipated to underpin the use of digital out-of-home in out-of-home advertising media plans. This research approach is justified due similar research methods adopted in previous studies (Nyilasy and Reid, 2009; Roux, 2016), both of which research the viewpoint of practitioners in relation to advertising. The findings will be analysed and interpreted for discussion relative to the current literature on digital out-of-home advertising and its effect on out-of-home advertising from which marketing practitioners, researchers and key stakeholders in the out-of-home advertising industry, can benefit. This study will showcase the use of digital out-of-home advertising in out-of-home campaigns and, subsequently, how it is becoming a highly effective form of media (Clarke, 2003). Time and dissertation length constraints restricted the research to discussions on a selected number of viewpoints as most frequently cited by the literature and research findings.

1.4 Scope of the Study

The scope of the study assists in clarifying the investigation and in determining the outcome. The in-depth interviews focused on digital out-of-home advertising, of which seven Irish out-of-home industry practitioners participated. The researcher concentrated on gaining a better understanding of the perceptions of practitioners of digital out-of-home and how it contributes to traditional out-of-home advertising, in order to satisfy the research objectives outlined in Chapter 3, section 3.2. To facilitate a more detailed analysis, a small sample size was used – allowing time to cherish the diversity and value of observations to produce informative and considered discussions in the present study.

1.5 Structure and Organisation of the Study

This research is organised into Chapters which are detailed below:

Chapter 2: Literature Review

The literature review aims to expand on digital out-of-home advertising both as a research subject and as a media channel. It presents a critical analysis of existing academic theories and studies from current literature available. The study seeks to explore the perspectives of industry practitioners on digital out-of-home, relevant literature on the development out-of-home industry into the digital era, and digital out-of-home as an advertising vehicle itself, and these will be addressed and intertwined throughout this chapter.

Chapter 3: Research Questions and Objectives

This chapter will state the main research question and provide a detailed insight into the research objectives.

Chapter 4: Methodology

To answer the main research question and to satisfy the research objectives, this chapter will examine and justify the methodology. This chapter also details the research sample, its selection process, as well as any ethical considerations.

Chapter 5: Findings and Analysis

This chapter presents the results of the primary research conducted. Through a thematic analysis approach, the dominant themes are identified as well as important topics relevant to the research objectives specified in Chapter 3.

Chapter 6: Discussion

A critical reflection on the study is offered by the researcher in this chapter. By comparing and contrasting the key findings from the qualitative research with the literature discussed in Chapter 2, the implications of the study are considered in order to draw conclusions. The limitations of the study are also addressed in this chapter.

Chapter 7: Conclusion

Lastly, this final chapter will reflect on the conclusions drawn from the research and determine as to whether the research objectives, and consequently the main research question, have been satisfied. This chapter also embraces recommendations for further research.

Chapter 2: Literature Review

2.1 Introduction

Out-of-home advertising has long been thought of as simply static outdoor displays next to the road (Roux and Van der Waldt, 2014), however, digital technology has revolutionised the traditional medium (Taylor, 2015), turning the former poster digital. This has created a palpable sense of excitement as a result of both the abundance of new opportunities it can offer advertisers at this moment in time, and in terms of what it may be capable of in the future (Bold, 2008). In this new era of technology and digitalisation, out-of-home advertising has managed to adapt and earn its place as one of the most used media channels (Bostina-Bratu *et al.*, 2018).

Included in this chapter is both theoretical and practical research on the developing phenomenon of digital out-of-home advertising in the out-of-home industry. Conclusions established by the author will be put forward from a critical perspective. The objective of this chapter is to present an academic background to digital out-of-home and its role in out-of-home advertising campaigns. To begin with, advertising theory will first be presented with a generalisation on the rationale for out-of-home advertising, leading on to the transition from the traditional out-of-home industry to the digital out-of-home industry, and what it anticipated for the future out-of-home industry. The phenomenon is then explored in terms of an advertising medium ahead of the literature narrowing down the focus to specifically consider its influence at the point of purchase, its unique features, and the drawbacks of the format.

2.2 The Concept of Out-of-Home Advertising

Richards and Curran (2002) define advertising as “*a paid non-personal communication from an identified sponsor, using mass media to persuade or influence an audience*” (p. 63). This definition has remained almost unchanged after attempts to encourage both academics and practitioners in the field of advertising to examine and reconsider its

definition (Xiaoli and Ronald, 2004). Considered a fundamental component for the economic development of marketeers and businesses (Ryans, 1996), advertising is proffered as a means of communication that influences attitudes towards a brand by encouraging audiences to make a purchasing decision about a product or service and to deliver information (Goldsmith and Lafferty, 2002; Haider and Shakib, 2018) through various media vehicles, including out-of-home, television, print (i.e. newspapers and magazines), radio, and the internet (Ahmed and Ashfag, 2013).

Ha and McCann (2008) suggest that is getting increasingly difficult to attract the attention of a consumer, as they are overwhelmed by the quantity of advertising messages they receive daily, meaning they therefore must decide which messages to block out and which to process (Taylor *et al.*, 2006). Therefore, the amount of advertising that consumers are subject to is seen as a significant barrier to its effectiveness. In this perspective, media-planning expert Erwin Ephron observed that out-of-home advertising is considered a unique medium as people are not as involved with it as they would be with other advertising mediums, such as watching a television programme or reading the newspaper (Ephron, 2004, cited in Taylor *et al.*, 2006). It costs nothing to consumers, offering both value for time and money, by occupying “*dead time*” (Bostina-Bratu *et al.*, 2018, p. 71). As a result, the “*medium is the message*” with out-of-home (Taylor *et al.*, 2006, p. 23). Therefore, as out-of-home progresses into the digital era, practitioners and advertisers alike should consider how they can maximise the effectiveness of the message they are trying to get across to consumers.

2.2.1 Benefits of Out-of-Home Advertising

The literature reviewed highlights multiple benefits of out-of-home advertising. Many academics believe that one of the most significant benefits is its ability to raise brand awareness very quickly, aided by the high levels of frequency it can achieve (Belch and Belch, 1998; Bhargava *et al.*, 1999; Roux, 2016; Fasi and Begum, 2017). Through high visibility and strong visual impact (Roux and Van der Waladt, 2014; Ramirez, 2015; Roux, 2016) out-of-home has the power to drive interest. Roux (2016) argues that out-of-home

advertising can complement other media, therefore, assuming the role of an amplifier for other advertising media, such as television or radio advertisements. Fasi and Begum (2017) believe that it is actually at its most effective when coupled with other media. Aside from including a ‘call-to-action’ in creative, many out-of-home formats are positioned close to the point of sale (Ramirez, 2015; Roux, 2016) and can be further enhanced by placing attention-getting messages on these (Taylor and Franke, 2003; Taylor *et al.*, 2006; Huntington, 2009).

2.2.2 Drawbacks of Out-of-Home Advertising

It is clear from the literature that the benefits of out-of-home advertising far out-weigh the drawbacks, and evident from the near absence of critical comment. Fasi and Begum (2017) states that out-of-home advertising is a “*glance medium*” (p. 38), believing that, at best, it draws between two and three seconds of a viewer’s time. This consequently impacts the creative opportunities available for out-of-home, indicating that certain guidelines should be adhered to. Bernstein (1997 suggests including elements such as simplicity, boldness, having on dominant message, not too many words, big, clear and legible font, in order for messages to appear brief and fit into that limited time-frame (Fasi and Begum (2017).

2.3 The Developing Out-of-Home Advertising Industry

As Roux and Van der Waldt (2014) states, the nature of out-of-home is changing. Over the coming decades, it is anticipated that the out-of-home advertising industry will carry on growing and diversifying as academics believe it will be the only available media by which advertisers can reach the progressively elusive consumer (Roux and Van der Waldt, 2014; Ramirez, 2015; Bostina-Bratu *et al.*, 2018). Built on theoretical and practical research, the following three sections demonstrate the transition of the out-of-home industry from traditional to digital out-of-home (i.e. the modern out-of-home industry), and what the future out-of-home industry may consist of.

2.3.1 The Traditional Out-of-Home Industry

Often portrayed as the last broadcast medium targeting people outside of their homes, out-of-home offers broad and fast near-national reach, next only to television in terms of other advertising channels (WARC, 2018). It has always been unavoidable in nature, allowing advertisers to break through the barrier to advertising consent (Roux and Van der Walddt, 2014). It is believed to encourage freedom and creativity (Zukin and Maguire, 2004), educate the public (Haider and Shakib, 2018), influence people's emotions (Moore and Harris, 1996), and thereby prompt consumers to take action (Huntington, 2009). Users of out-of-home advertising consider it to be of higher-quality than other media due to its ability to convey information at a justifiable price, captivate new consumers, and assign relevant messaging near to the point-of-purchase to drive consumption (Taylor and Franke, 2003; Taylor *et al.*, 2006; Roux, 2016).

The three main types of traditional out-of-home advertising, as identified by Fill (2009), are: 'street furniture', 'transit' and 'billboards'. Adopting a similar classification outlook, Cronin (2010) identifies four primary traditional out-of-home advertising categories: 'billboards' (e.g. at the roadside), 'posters' (e.g. bus shelter panels, free-standing panels within retail/pedestrian areas etc.), 'transport' (e.g. bus sides, inside trains and train stations etc.) and 'ambient' (e.g. vinyl printing on telephone kiosks etc.). Therefore, until recently, the out-of-home advertising media landscape consisted primarily of advertising 'outdoors' and signage reaching vehicular traffic (Biraghi *et al.*, 2015).

2.3.2 The Modern Out-of-Home Industry

The out-of-home industry has invested significantly in a digital transformation helping to reignite excitement amongst marketers by making out-of-home advertising more creative, interactive and targeted (Hobbs, 2017). Today's out-of-home advertising market is a vibrant mix of billboards, digital screens, transit, street furniture, and place-based media that surround and engage consumers during the increased time spent with media outside of their homes (OAAA, 2016; Wylie and Hardy, 2017). Although static outdoor

advertising signs dominated out-of-home advertising media landscape at one point in time, advertisers are now offered a much wider array of opportunities due to the introduction of digital out-of-home (Bold, 2008). These digital screens have today replaced numerous traditional static signs, with the capability to display video and animated advertisements (Roux and Van der Waladt, 2014). Comprising of a variety of screen shapes, sizes, and levels of interactivity and ranging from digital billboards to digital signage at airport gates, gyms and waiting rooms, Ramirez (2015) highlights that digital out-of-home underlines “*a necessary bridge between context and location in relevance and favourable recall – vital components of any media campaign*”.

With the growth of out-of-home advertising in recent years, particularly because of the expansion to digital formats, there has been an increase in research interest (McEvoy, 2001). However, it is regularly neglected by marketing academics (Koeck and Warnaby, 2014), remaining an under researched medium (Whitehill King and Tinkham, 1989; Woodside, 1990; Donthu *et al.*, 1993; Katz, 2003).

2.3.3 The Future Out-of-Home Industry

Ocean Outdoor (2016) conducted a survey with executives from media agencies and out-of-home specialists, from which 86.3% of them identified digital out-of-home as having the biggest growth potential over mobile, video-on-demand (VOD) and other media channels. For example, due to the availability of advertisement skipping and avoidance features, VOD television viewing, combined with second-screening with one’s mobile device, has removed the opportunity to see many of the television advertisements on which modern marketing is predicated (Fulgoni *et al.*, 2017). The trend is similar for the internet as the rapid rise of advertisement-blocking technology has stopped most advertisement impressions from ever being served to a computer or mobile screen (Fisher, 2017; Fulgoni *et al.*, 2017). Simon Jenkins, Strategy Director at MPG – a UK based media agency, states that “*in five years’ time, when TV viewing becomes more fragmented, and more people go on the web, digital out-of-home will be the one place where advertisers can still get people in big groups, so outdoor will get stronger and stronger*” (Bold, 2008).

It is predicted that digital out-of-home revenues will overtake traditional out-of-home spend by 2020 (Ocean Outdoor, 2016), as it continues to act as a key component for out-of-home industry growth. Aside from physical inventory investment, this growth is fuelled by new technologies resulting in increased innovative creativity, playing to the mediums' strengths (Ocean Outdoor, 2016). Although, inevitably with the expansion of new digital out-of-home formats, it will result in the reduction in the number of traditional poster sites, Franch *et al.* (2013) states that due to the cost of technology along with logistical restrictions and strategic obstacles, not all out-of-home advertising will be digitalised. Bold (2008) believes that posters will always have a role in the out-of-home industry; "*it's naïve to think that digital will take over*". Its progression has been the topic of many industry discussions (see Benady, 2011; Derrick, 2011; Copley, 2012), thereby encouraging greater experimentation and consequently opening the opportunity for more imaginative and unmissable advertising (Benady, 2011; Kinetic 2011).

2.4 Digital Out-of-Home: An Advertising Medium

Digital out-of-home formats, by nature, are generally erected in locations as opposed to on routes (Clohessy, 2017). Therefore, many of the guiding principles associated with traditional out-of-home advertising – as previously mentioned by Bernstein (1997) in section 2.2.3 – completely change for digital out-of-home, as rather than trying to convey a message to people on the move, genuine communication can transpire when people have stopped. Clohessy (2017) believes that "*having reached their destination, audiences are in a more positive frame of mind...they tend to be happier, more relaxed and more receptive*". Frequently referred to as *digital signage* by academics (Harrison and Andrusiewicz, 2004; Burke, 2009; Grewal *et al.*, 2011; Dennis *et al.*, 2014; Wylie and Hardy, 2017), digital out-of-home has become an important communications channel for advertisers to utilise (Clohessy, 2017). It is a relatively new atmospheric stimuli (Grewal *et al.*, 2011), that are operated both outdoors and in a vast number of commercial environments, including bars, pubs, hotels, airports, movie theatres, shopping centres, supermarkets, convenience stores, etc. (Willems *et al.*, 2017). Consequently, these specific digital out-of-home environments allow advertisers to niche target their

campaigns according to their desired audience (Clohessy, 2017). This new medium can be loaded with customised content to be viewed by specific audiences; such as business travellers waiting on their morning flight or shoppers queuing at the supermarket in the afternoon (Roux and Van der Waldt, 2014).

Roux and Van der Waldt (2014) acknowledge that, globally, digital out-of-home is one of the fastest growing media types attributable to its expansion into new venues and markets, innovation, enhanced features and the integration of mobile and social media. By offering “*the flexibility of a broadcast medium in the high street*” (Bold, 2008), digital out-of-home advertising has the ability to capture the interest of many through its various functionalities (Harrison and Andrusiewicz, 2004). How exactly these functionalities of digital-out-home contribute to traditional out-of-home advertising and any associated challenges, from the perspective of practitioners, appears to remain largely un-researched by academia. Thus far, numerous academics have focused on the consumers relationship with digital signage; Newman *et al.* (2007) performed an in-depth qualitative study based on consumer focus groups to examine the impact of digital signage and Dennis *et al.* (2014) researched about the affective experience of digital signage with consumers through a structured questionnaire. While Roux (2016) investigated the perspectives of practitioners surrounding out-of-home advertising, this study focused on its role within IMC campaigns – digital out-of-home advertising has yet to be researched as to how it contributes to out-of-home as a medium.

2.5 Digital Out-of-Home: A Point of Purchase Influence

Purchase intention tends to be positively affected through the initial exposure to an advertisement (Xiaoli and Ronald, 2004). Therefore, when aiming to influence buying behaviour, the best place to do so is at the point of purchase, and as Burke (2009) identifies, digital signage within retail shopping environments has become an important new channel for communicating with consumers. Additionally, digital signage can help to reignite the thrill of shopping in-store and improve competitiveness in the changing marketplace (Willems *et al.*, 2017). These digital signage advertising networks are

increasingly being implemented in point-of-sale environments as well; leading retailers such as Tesco, Asda, or Harrods (UK), Kroger (USA), or Carrefour (China), have all equipped their stores with digital signage networks (Dennis *et al.*, 2010).

According to Schmitt (1999) retail environments can provide consumers with compelling experiences that can positively affect consumer shopping behaviour, reflected by both the time spent in store and total spend (Newman *et al.*, 2007; Dennis, *et al.*, 2014). Digital signage in retail environments offers advertisers the tools to publicise premium imagery and animated content (Clohessy, 2017), and carries immense potential to drive immediate impact and scale when in proximity to the point of purchase (Ramirez, 2015). According to Roux (2016) the closer the advertisement appears to the point of purchase, the better likelihood that consumers would be able to recall the advert, and ideally, be influenced by it. However, Haider and Shakib (2018) disagree with this, claiming that if consumers see an advertisement of a product anywhere they are more motivated to buy it.

The versatile nature of digital signage encourages advertisers to convert their advertising messages to be suitable for display on digital screens (Muller *et al.*, 2009), allowing them to target shoppers while they are receptive and in a buying mindset (Dennis *et al.*, 2010). Burke (2009, p. 180) states shoppers are “*most responsive to messages that relate to the task at hand and their current need state*”. Concurring with this, Dennis *et al.* (2014) discovered from their digital signage research, that it can be affective in increasing shoppers’ intentions to both buy from an advertiser on a digital screen, and from a store that carries a digital signage network.

As mentioned, there have been a number of studies related to digital signage that have focused on the consumers perception, that have led to interesting findings; Dennis *et al.* (2010) concluded from their study that respondents considered digital signage as contributing to a positive mall image, Newman *et al.* (2010) established that consumers perceptions of the brands displayed on digital out-of-home advertising screens in shopping malls are affected positively by enhancing their image; leading to a more modern perception, as well as entertaining customers and consequently improving sales

and Dennis *et al.* (2013) discovered that respondents perceive digital signage as being high-tech and therefore attractive.

2.6 Digital Out-of-Home: The Features

The aim of every advertiser is to reach the right people in the right place at the right time, both efficiently and cost effectively (Taylor and Franke, 2003; Tam and Ho, 2006; Taylor *et al.*, 2006 Clohessy, 2017). The literature offers three unique features of digital out-of-home that have been recognised in comparison to traditional out-of-home, which can be used to attract the attention of consumers who are literally out-of-home, i.e. in transit or at commercial locations. These unique features are motion/animation, flexibility and dynamic capabilities.

2.6.1 Motion/Animation

With regards to human physiology, it is movement that captures the attention of the eye – it's not always a direct result of light (Koeck and Warnaby, 2014). Muller *et al.* (2009) advocates that by displaying animation and incorporating colourful and interesting content, it can stimulate audience interest through the latest technology employed in these full colour and large format electronic signs, which tend to offer high quality levels of brightness and screen resolution (Roux and Van der Waladt, 2014). Consistent with this, Koeck and Warnaby (2014) insist that this full motion technology incorporated into digital signage has led to effectively attracting the attention of the passing target audience and, as a consequence, generates increased sales revenues.

The ability to display full motion video and the inclusion of animation, effectively means that television commercials can be shown outdoors (Roux and Van der Waladt, 2014). Richard Bon, Group Sales Director at Clear Channel UK, one of the UK's leading out-of-home media owners remarks, “*nothing's more disappointing than seeing a static, classic poster on a digital panel*” (Fisher, 2017).

2.6.2 Flexibility

Digital out-of-home allows advertisers to plan their campaigns to focus on the moments they want, in the places they want, at the times they want (Fisher, 2017), bringing flexibility to the medium. Traditional out-of-home advertising requires long lead-times before an advertisement is made public, whereas digital out-of-home effectively lends advertisers the control to publish copy at the click of a mouse (Bold, 2008). This type of advertising is more effective for content and advertising delivery because it allows advertisers to customise their messages instantaneously (Roux and Van der Waldt, 2014). Wylie and Hardy (2017, p. 18) describe this as digital signage being able to offer “*flexibility and fluidity*” as it is easy to instantly swap out content by uploading it to a server, whereas a static sign can only be updated if an employee physically changes out the sign.

What this flexibility offers to advertisers, is that their out-of-home campaigns can now be timed so that messages are delivered at the appropriate moments (Clohessy, 2017), turning their digital out-of-home advertising into spectacles and events (Koeck and Warnaby, 2014). Bold (2008) describes it as a “*revolutionary digital landscape*” by enabling advertisers to “*post high-definition posters at key times of day*”. Whether this be the time of day or day of the week, it allows digital out-of-home to be the out-of-home format that can facilitate “*contextual connections*” (Clohessy, 2017), meaning that the campaigns are responsive to what’s going on (Roux and Van der Waldt, 2014).

2.6.3 Dynamic Capabilities

As digital out-of-home continues to grow, practitioners should be educating advertisers as to how to produce content that is genuinely useful (Ocean Outdoor, 2016). With digital out-of-home, the out-of-home industry has been given the opportunity to reposition itself similar to digital online advertising in terms of the offerings now available, and in particular, given the expanding popularity of screens that are enabled to carry third-party content (Bold, 2008). Bauer and Lasinger (2014) describe the dynamic capabilities of

digital out-of-home as the changing of advertising messages in real time based on information sourced from an information systems situational context, such as weather, location and time. This allows for the creation hundreds of pieces of copy for one campaign, supporting smarter communication between brands and their audience (Posterscope, 2018). According to Koeck and Warnaby (2014, p. 1405) because of this emerging technology, there is beginning to be an emphasis towards digital signage providing an “*interactive out of-home experience*”. Dynamic advertising is helping to make the medium more engaging for consumers by allowing advertisers publish relevant real-time customised content, instead of only one-way static advertising messages (Roux and Van der Waldt, 2014; Ocean Outdoor, 2016). Bauer and Lasinger (2014, p. 101) state that this “*personalisation can break through the information clutter in digital media and increase advertising effectiveness*”, thereby increasing the audiences’ levels of attention (Malheiros *et al.*, 2012). While Vesanen (2007) states that personalisation in advertising has a long history, conversely Adams (2004) declares that the dynamic adaptation of advertisements in real time, enabled by digital out-of-home being comparatively new.

With these dynamic capabilities, advertisers are now regularly referring to location, weather conditions, audience, time of day and traffic all in the one frame (Posterscope 2018), thereby creating dynamic communication content and consumer engagement through the real-time adaptation of their advertisements (Roux and Van der Waldt, 2014). Tam and Ho (2006) claim that dynamic advertisements are one of the best ways to break through information clutter and the campaigns effectiveness. It is predicted that there will be an increase this implementation of “*client first-party data*”, i.e. using their own information, like the train times, which allows brands to “*use digital out-of-home to talk to customers with more personalised and relevant messaging*” (Posterscope, 2018). Kinetic (2011) put forward the suggestion that recent developments in the technology placed out-of-home advertising at a crossroads, where a number of future directions are possible, therefore offering the potential for significant and potentially important research opportunities into the future.

2.7 Digital Out-of-Home: The Drawbacks

There were very few drawbacks acknowledged in the literature appropriate to digital out-of-home advertising. Franch *et al.* (2013) recognise that as the out-of-home industry progresses to digital it will inevitably involve significant changes in both the conception and production of advertising materials designed for these digital platforms. They believe that while you would expect more animation and moving image, “*the fact is however that many companies won’t spend a lot of money on expensive or expensive alternatives because the production of posters is much less expensive to roll-out across tens, hundreds or thousands of spots*” (ibid, p. 94). They believe that this has to do with the fact that there is little tangible evidence that expensive high-tech solutions offer an adequate return on investment.

2.8 Conclusion

There is a shared agreement amongst academics that the modern out-of-home advertising industry is very different from the traditional ‘outdoor industry’ since it has entered the digital era (Lane *et al.*, 2011; Belch and Belch, 2012; Roux and Van der Walddt, 2014; Sissors and Baron, 2014; Taylor, 2015, Roux, 2016). The literature has emphasised that with its new-found versatility, driven by the unique features of digital out-of-home, such as motion/animation, flexibility and dynamic capabilities, the out-of-home industry is “*enjoying a renaissance in many markets*” (WARC, 2018). However, the literature lacks up-to-date theory of the latest perceptions of practitioners of digital out-of-home, the challenges they face when planning digital out-of-home into out-of-home campaigns and how they are influencing advertisers to incorporate it into their out-of-home advertising campaigns, all-in-all forcing the industry to consider how it contributes to traditional out-of-home advertising. As Taylor *et al.* (2006) declare, both advertising agencies and out-of-home advertising firms play a role in communicating the importance of the success factors to their clients.

Chapter 3: Research Question and Objectives

3.1 Research Question

A review of the literature revealed a common theme that highlights the need to provide meaningful insights into the phenomenon of digital out-of-home advertising and specifically its purpose alongside traditional out-of-home advertising from the perspective of industry practitioners. Therefore, the research question asks; *How does digital out-of-home advertising contribute to traditional out-of-home advertising?* In order to answer this question, this study aims to explore the attitudes to, and perceptions of, digital out-of-home advertising so as to better how it relates to traditional out-of-home advertising.

3.2 Research Objectives

The three objectives have been identified by the author to assist the investigation into the research question;

3.2.1 Objective 1: To assess the opinions of industry practitioners of digital out-of-home advertising in comparison to traditional out-of-home advertising.

As is evident from the literature, much of the empirical research carried out about digital out-of-home advertising has studied the perspective of the customer and their reactional behaviour to the format (Newman *et al.*, 2007; Dennis *et al.*, 2010; Newman *et al.*, 2010; Dennis *et al.*, 2013; Dennis *et al.*, 2014). Therefore, the purpose of this objective is to investigate the perspectives of industry practitioners so as to better understand their opinions and viewpoints of digital-out-of-home as an advertising format, in comparison to traditional out-of-home.

3.2.2 Objective 2: To understand the challenges faced by industry practitioners when planning digital out-of-home in out-of-home advertising campaigns.

There are many formats available to campaign planners to choose from when planning out-of-home advertising campaigns as described by the literature (Fill, 2009; Cronin, 2010). Digital out-of-home stands out from traditional out-of-home formats as it is not a paper poster format. The array of possibilities in how to use the format are much wider compared to paper poster formats, as suggested by the literature (Bold, 2008; Muller *et al.*, 2009; Koeck and Warnaby, 2014; Roux and Van der Waldt, 2014; Clohessy, 2017). Furthermore, the literature suggests there are few drawbacks associated with digital out-of-home. Therefore, with the rapid expansion of digital out-of-home networks in Ireland, this objective will help to understand what challenges practitioners are faced with from advertisers when it comes to planning digital out-of-home into out-of-home advertising campaigns.

3.2.3 Objective 3: To identify how industry practitioners influence advertisers to incorporate digital out-of-home into out-of-home advertising campaigns.

Digital out-of-home advertising has been subject of heavy investment by Irish media owners over the last eighteen months. As a result, there is now more inventory than ever before. Consequently, a shift is required in how industry practitioners manage out-of-home in terms of incorporating digital out-of-home formats into the advertising campaign. An investigation into how practitioners are facilitating the changing nature of out-of-home (Roux and Van der Waldt, 2014) is sought as their aim should no longer be to merely obtain maximum exposure or to deliver a message to a mass audience; it should rather be to deliver quality media exposures to the relevant out-of-home audiences, and the right moment, integrating all of the unique features that digital out-of-home offers.

The research methodology is illustrated in Chapter 4 with these three objectives in mind.

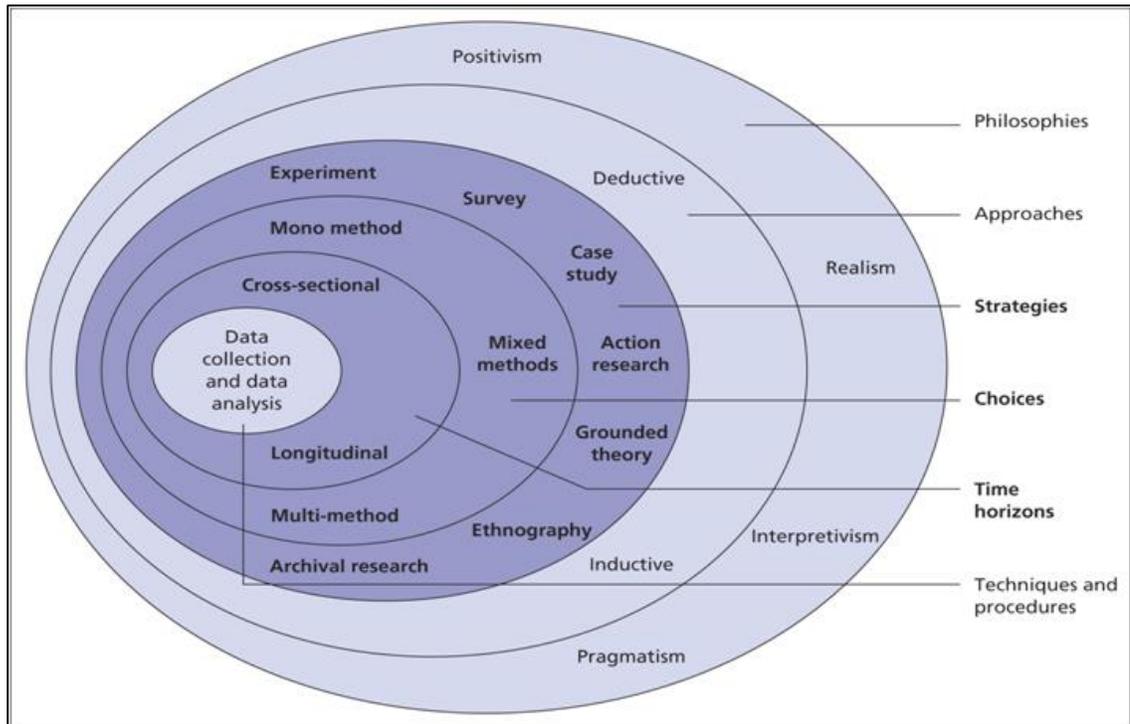
Chapter 4: Methodology

4.1 Introduction

Saunders *et al.* (2015) highlights the need to justify the theory behind the research. Therefore, having reviewed the literature relevant to the research topic, this chapter describes the methodological decisions undertaken by the researcher as to how primary research will be conducted. According to Blaikie (2000) the research strategy chosen provides both a starting point and a set of steps to follow in order to answer the research question. To prepare for this, and in keeping with the three research objectives presented in Chapter 3, the ‘Research Onion’ (Figure 1) exemplifies the elements within the methodology (Saunders *et al.*, 2015). It presents a clear framework for the most suitable methods and strategies to address the research problem as well as describing the stages through which the researcher must pass when formulating an effective methodology.

The intention of the methodology is to direct the research. Merriam (2009, p. 23) suggests that qualitative researchers seek to decipher “(1) *how people interpret their experiences*, (2) *how they construct their worlds*, and (3) *what meaning they attribute to their experiences*”. Silverman (2009) states that a powerful feature of qualitative research is the authenticity of human experience. For this research, a qualitative method in form of in-depth interviews is implemented. Within this chapter, an outline of data collection methods is demonstrated as well as sampling and analysis techniques. Later in this chapter, both the research limitations and ethical considerations will be addressed.

Figure 1: The Research Onion



Source: Saunders *et al.* (2012).

4.2 Research Philosophy

Research philosophy is described as the development of knowledge and the nature of knowledge (Saunders *et al.*, 2009). Guided by the ‘Research Onion’; this process occurs in layers, involving a series of decisions before arriving at the overall approach to the research design and data collection technique; “*a philosophical framework that guides how scientific research should be conducted*” (Collis and Hussey, 2009, p. 55). The aim of this study is to understand how digital out-of-home advertising contributes to traditional out-of-home advertising from the perspective of industry practitioners. To gain these insights, data will be collected from ‘out-of-home specialists’, whom are from both out-of-home advertising media-specialist agencies and leading media-only agencies so as to interpret a full industry perspective. The criteria required for participants in order to be considered ‘out-of-home specialists’ will be detailed in section 4.6.

An interpretivist methodology depends on naturalised methods, such as interviewing (Saunders *et al.*, 2015), and is believed to be supportive of qualitative data collection (Lin, 1998). Due to its subjective outlook, interpretivism is the philosophy recognised as most applicable for this study (Bryman, 2014). By “*entering the social world of our research subjects and understand their world from their point of view*” (Saunders *et al.*, 2009, p. 116) it is argued by interpretivists that information collected from humans offers meaning (Saunders *et al.*, 2012), as opposed to a positivistic approach where a scientific method of developing accurate information on a physical reality is implemented.

4.3 Research Approach

Two different research approaches to theory development are acknowledged within the second layer in the ‘Research Onion’ (Figure 1). Disputed by Saunders *et al.* (2009), the cause and effect between two variables is a conclusion of theory. The two approaches in which theory can be understood are; (1) deductive – the testing of existing theories, and, (2) inductive – the formulation of new theories. Quantitative research is generally identified with a deductive approach, involving rigid data collection demanding large samples in order to derive conclusions from the statistical testing, as the researchers’ objectives lies in proving or disproving the theory (Lin, 1998). For qualitative research, embracing an inductive approach is more frequently the case (*ibid.*). The focus of this research question is not to extract a hypothesis from it, as is the intention of applying a deductive approach, therefore an inductive approach is considered to be the best fitting method for this study. This approach permits the researcher to extrapolate conclusions understood from the findings by determining themes that produce new theory (Bryman, 2011; Creswell, 2014).

4.4 Research Strategy: In-Depth Interviews

Saunders *et al.* (2003, p. 90) define research strategy as “*a general plan of how the researcher will go about answering the research questions*”. Qualitative data analysis, unlike quantitative data analysis, is not concerned with analysing statistical data results,

but with the analysis of codes, themes, and patterns in the data (Tesch, 1990). This allows the researcher to formulate a rich understanding of the procedures of the concerned area and the perceptions of an associated sample (Wahyuni, 2012), as its primary purpose is to describe, explore, and explain phenomena being studied (Miles and Huberman, 1994). Staying with an interpretivist paradigm, this study adopts qualitative research methods, to explore the reality, by engaging in seven in-depth interviews with out-of-home media specialists. Research suggests that qualitative interviews are likely to be more effective in procuring authentic accounts of the participants' experiences above other data collection methods, thereby reducing the possibility of social desirability bias arising (Hiller, 2010). The use of qualitative data analysis permeates respected advertising and marketing communications literature (Kitchen and Schultz, 1999; Gould, 2000; Goulding, 2005; Eagle *et al.*, 2007; Altheide and Schneider, 2012). Building on this, it has also been widely used to investigate the practices and perspectives of advertisers and their agencies on various topics related to this study such as the planning of street marketing (Saucet and Cova, 2015), alternative out-of-home advertising (Biraghi *et al.*, 2015) and the role of out-of-home advertising media in IMC campaigns (Roux, 2016).

The aim of a quantitative research approach is formulating broad conclusions (Stake, 1995), which involves relying on numerical data characterising results captured from a large sample of variant participants. Whereas, the aim of this study is to develop a comprehensive understanding from the viewpoint of participants, which would prove unattainable using a quantitative approach. It will be through a direct interpretation of the narratives that the results are expressed. Boodhoo and Purmessur (2009) suggest that as the sampling is more targeted for qualitative research, it results in there being a stronger likelihood of creating realistic data for experimental understanding.

4.5 Research Design

The method to be used for data collection needs to be specified clearly in the research design (Blaikie, 2009). This research is an exploratory study into digital out-of-home advertising. Robson (2002) describes exploratory studies as being extremely valuable at

discovering; (1) what is happening, (2) new understandings, and, (3) a phenomenon in a new light. Additionally, exploratory research is beneficial when the exact nature of the problem is not understood, and clarification is required (Saunders *et al.*, 2009). These understandings are developed through the qualitative research methods, as it respects the individuality of separate cases (Stake, 2000). The objectives of this research follow an explorative approach as the study endeavours to understand:

- (1) What are the opinions of industry practitioners of digital out-of-home advertising compared to traditional out-of-home advertising.
- (2) What the challenges are faced by industry practitioners when planning digital out-of-home in out-of-home advertising campaigns.
- (3) How industry practitioner's influence advertisers to incorporate digital out-of-home into out-of-home advertising campaigns.

To gather real and relevant insight into how digital out-of-home advertising contributes to traditional out-of-home advertising, seven in-depth interviews were carried out with out-of-home specialists in prominent out-of-home advertising media-specialist agencies and leading media-only agencies, as detailed in the following section.

4.6 Research Sample

Sampling is considered a guiding principle of qualitative research (Robinson, 2014). To recruit participants for the in-depth interviews, purposive non-probability sampling was applied. The need to acquire an assortment of perspectives on the research problem is stressed by Bryman (2014), therefore participants were selected from a mix of out-of-home media-specialist agencies and leading media-only agencies to best interpret and glean a full industry perspective. The main factor that led to the selection of each participant was their experience with the advertising industry and planning out-of-home

advertising campaigns; the criteria applied to consider them an out-of-home specialist demonstrated below.

4.6.1 Sampling Techniques

There are two primary types of sampling presented by Saunders *et al.* (2012); (1) probability and (2) non-probability; with the difference between them being that probability is a representative sample whilst non-probability is not – a benefit of which is that it is less time-consuming (Baker, 2006). To allow the researcher to use their own judgement (Patton, 2002), the purposive element of non-probability sampling was adopted for participant selection. The following set of criteria were established for participants to be considered for the sample;

- (1) A minimum of four years' experience working in the advertising industry.
- (2) A minimum of two years' experience planning out-of-home advertising campaigns.
- (3) Job position at Manager level or above.

4.6.2 Sample Size

The sample size for a qualitative study that uses purposive sampling is determined by the information that is needed (Patton, 2002), therefore, because of the in-depth nature of the studies and the analysis of the data required – this usually results in a small, selective sample (Cormack, 1991). Hogan *et al.* (2009) believes that with a smaller sample size, due to the richness of the data arising from the extra attention that can be committed to each participant, it yields more accurate results. According to Saunders *et al.* (2015), a minimum sample size of five participants is required when conducting semi-structured in-depth interviews. A larger sample size is not essential for an exploratory qualitative study with an inductive approach, as the objective is to gather in-depth insights of a situation within a specific context, and not to generalise information to the larger population (Lincoln and Guba, 1985).

Based on the criteria outlined in section 4.6.1, twelve potential participants were initially approached to take part in the study, of which seven participated, and which was representative of five companies. Information on each participant is outlined below in Table 1.

Table 1: Interview Participants

<p>Participant 1</p> <ul style="list-style-type: none"> - Years' experience in advertising industry: 4 - Years' experience planning out-of-home campaigns: 4 - Account Manager 	<p>Participant 2</p> <ul style="list-style-type: none"> - Years' experience in advertising industry: 6 - Years' experience planning out-of-home campaigns: 6 - Deputy Managing Director
<p>Participant 3</p> <ul style="list-style-type: none"> - Years' experience in advertising industry: 4 - Years' experience planning out-of-home campaigns: 2 - Account Director 	<p>Participant 4</p> <ul style="list-style-type: none"> - Years' experience in advertising industry: 12 - Years' experience planning out-of-home campaigns: 12 - Digital, Innovation and Experiential Manager
<p>Participant 5</p> <ul style="list-style-type: none"> - Years' experience in advertising industry: 4 - Years' experience planning out-of-home campaigns: 2 - Client Account Manager 	<p>Participant 6</p> <ul style="list-style-type: none"> - Years' experience in advertising industry: 8 - Years' experience planning out-of-home campaigns: 4 - Commercial Director
<p>Participant 7</p> <ul style="list-style-type: none"> - Years' experience in advertising industry: 5 - Years' experience planning out-of-home campaigns: 5 - Senior Account Manager 	

4.7 Data Collection

As previously stated, a qualitative research approach was selected for this study in the form of in-depth interviews and due to their ability to provide much more detailed information than is usually possible through other data collection methods (Roux, 2016), and the potential to yield insight from illuminative rich information sources (Patton, 2002). In-depth interviews also permit the exploration of “*emic*” (informant-determined) perspectives and viewpoints (Kvale, 1996, p. 261).

4.7.1 In-Depth Interviews

A series of semi-structured, in-depth interviews were chosen for this study as the primary method of data collection, which is deemed the most appropriate for an exploratory study (Cooper and Schindler, 2008; Saunders *et al.*, 2009). By adopting a semi-structured approach, it allows both the flexibility to delve into new topics from the perspective of each participant (Saunders *et al.*, 2009), and grants participants the freedom to answer the questions in a way that makes most sense to them (Fisher, 2007). This helps to encourage a natural, free-flowing conversation, while all the time maintaining consistency across the interviews from using similar questions. Blaikie (2009, p. 17) states that “*research questions constitute the most important element of any research design*”. In line with this, Patton (2002) highlights that establishing the right interview questions and predicting potential probing questions is fundamental to extracting the most intuitive answers. Based on the key issues founded from the literature review, in conjunction with each research objective set, the interview questions were developed (see Appendix 1).

In order to establish a rapport from the outset with each interviewee, the questions began with simple questions on out-of-home advertising in general. Thereafter, in an effort to avoid short answers and minimise bias, the questions were designed to prompt discussion (Easterby-Smith *et al.*, 2008) and, where specific terminology/phrases were used, caution was exerted to affirm that the researcher and the interviewee shared the same understanding (Ghauri and Gronhaug, 2005; Easterby-Smith *et al.*, 2008). In quantitative

methods such as surveys, it is not possible to probe for further clarity with answers, or further information on a certain aspect, serving as a significant benefit of interviews because of the real-time situation and interpersonal interaction. All the interviewees were anonymised to guarantee meaningful and accurate responses. By having developed well-planned questions, it helped to elicit more valuable answers and granted additional time for listening and observing, ultimately requiring less probing.

All the participants were interviewed on a one-to-one basis and face-to-face. Attributable to the interpretative nature this study, King (2004) describes this as non-standardised practice. Each of the interviews lasted between 45 and 60 minutes. All participants were briefed prior to the interview on the purpose of the study, and the rationale behind why they had been selected – helping to define the desired outlook from the interview. Interview locations were chosen at the convenience of each participant, and to avoid interruption. Opening comments were carefully scripted to set the scene for the interviewee and help put them at ease. A conscious effort was made by the researcher to demonstrate legitimate interest in the interviewee through active and real listening – as they were discussing a topic of shared interest (Kvale, 2007). It was therefore essential that the researcher was viewed to be highly knowledgeable in the area of both out-of-home and digital out-of-home advertising as. Saunders *et al.* (2009) states that this demonstrates credibility, evaluates the accuracy of responses and encourages the interviewee to offer a more comprehensive interpretation of the topic in discussion. Early assurances were provided with respect to the use of confidential information and anonymity (Healey and Rawlinson, 1994). While written notes were made during the actual interview, each interview was digitally recorded in order to be analysed afterwards following transcription of the audio.

4.8 Data Analysis

Data analysis is required to contribute meaning to the findings and discuss their relevance to the research question and objectives (Saunders *et al.*, 2012). Qualitative data is notoriously more complicated than quantitative statistical data would appear. Hence,

significant time is required for the essential thorough analysis of the data in order to complete tasks such as transcribing, categorising, codifying recurrent themes and compiling allusive observations. Braun and Clarke (2006) recommend for an interpretivist approach to analysis the data inductively, through identifying themes within the data, and cross referencing this data with existing research in the field in order to draw conclusions or theories. Academics agree that thematic analysis is a relevant method of qualitative data analysis (Bendassolli, 2013; Namey *et al.*, 2016), and therefore, this approach will be used to analyse the data collected for this study.

4.8.1 Interview Analysis

Each interview was recorded on a Samsung audio recording app for post-interview analysis through a manual transcription, as well as hand written notes taken during the interview. The first stage of the data analysis involved the researcher partially transcribing the seven in-depth interviews in order to identify recurring themes amongst them. This resembles the guidance provided from Kvale (1996) who suggested that the stages of analysing qualitative data should begin simultaneously as the data is collected, as well as continuing directly afterwards. As a consequence of this, the opportunity was afforded for the researcher to analyse previous insights and compare them against the following participants' opinions (Erlandson *et al.*, 1993), thereby granting flexibility to the research process. The transcription of the interviews assisted the researcher in more fully understanding the respondents' opinions in order to visualise the phenomenon of digital out-of-home advertising through their eyes. To protect confidentiality and anonymity, each interview was saved as a separate word-document file, with a filename chosen that the researcher could easily recognise (Saunders *et al.*, 2009). From this data, the researcher identified and highlighted (using a specific colour-code) themes that linked back to the research objectives, and the data was categorised into “*meaningful chunks*” (Saunders *et al.*, 2009, p. 492), allowing the researcher to draw conclusions and establish relationships.

4.9 Ethical Considerations

Saunders *et al.* (2009) refers to research ethics as the analysis of complications that arise when human participants are involved in a study. Therefore, ethical considerations played a substantial role in the research methodology selection process. The next two sections – data privacy and data storage – will demonstrate the procedures implemented to certify ethical compliance for this research study. All data gathered and analysed was done so solely by the researcher.

4.9.1 Data Privacy

Collis and Hussey (2008) express that privacy is a paramount principle to protect research participants identities. All seven participants that took part in an in-depth interview were anonymised. Their choice to participate was completely on a voluntary basis – no reimbursement or incentives were offered reducing the risk of bias. As the interviews were recorded, explicit consent was sought from all participants prior to the interview commencing through a signed written agreement, which also granted the use of the data for the purposes of this study, and no other research. From the beginning, participants were given surety of the confidentiality of the entire data collection process. They were also given the opportunity to access, authorise and/or withdraw both themselves or any data from the study at any time.

The interview questions were sent to each participant prior to the interviews taking place, with a view to ensuring ‘no surprises’ giving the participants advanced notice and putting the interviewees at ease. The purpose and intention of the research was also explained in full to all participants at the opening of each interview.

4.9.2 Data Storage

All data collected in connection with this study was stored in a password-protected folder that could only be accessed by the researcher on a cloud file. As all interviews were

completed, the recorded file was transferred into this folder and removed permanently from the researchers recording device. Email addresses were collected from all participants so that if they requested access to their interview or any transcript materials this could be granted seamlessly through email communication. The recorded files will be kept until the research has been examined and the accreditation process completed.

4.10 Research Limitations

There are limitations associated with adopting in-depth interviews as a research technique. According to Brewerton and Millward (2001, p. 74) “...*due to their openness to so many types of bias, interviews can be notoriously unreliable, particularly when the researcher wishes to draw comparisons between data sets*”. Consistent with this, Creswell (2009, p. 153) claims that the reliability of interviews is “*elusive*” and adds that “*no study reports actual reliability data*”. Therefore, to best combat this, the following three steps have been implemented as recommended by Alshenqet (2014): (1) avoiding asking leading questions, (2) taking notes not just depending on audio recordings and (3) giving the interviewee a chance to summarise and clarify any points they have made.

Although it was a small sample that carried out the in-depth interviews, the long process required in order to effectively analysis the data is very time-consuming (Bryman and Bell, 2007). The author has been acutely aware of this and has endeavoured to achieve the best result within the time frame available for this study.

4.10.1 Research Quality

There are two concepts that come into consideration when striving to enhance the quality of the research; (1) validity, and, (2) reliability.

Pervan and Maimbo (2005) express that validity represents guaranteeing confidence in the findings and meticulous interpretation of the reality. This style of research is considered to be high in validity, as the opinions gathered are from very knowledgeable

participants due to the criteria required for selection outlined in section 4.6, therefore it “*demonstrates or measures what the researcher thinks or claims it does*” (Coolican, 1992, p. 35). In cases where small samples are used, Miles and Huberman (1994) question the credibility of results – however as small samples are common of qualitative research, the depth of the insights gathered makes up for this. To lessen the impact of this issue, the criteria implemented for the sample is rigid in order to obtain the most meaningful insights from a collection of perspectives of experienced practitioners.

Neuman (2014, p. 212) defines reliability as the “*dependability or consistency of the measure of a variable*”. What this implies is that research procedures can be replicated in the future under similar conditions to produce similar results. For the interviews, the questions were developed and grouped based on the research objectives to guide the conversations, enabling them to be used as a control to guarantee reliability of the data collected.

4.11 Conclusion

The focus of this chapter has been to outline and justify the reasoning for the chosen research strategy; in-depth interviews. Characterised as a qualitative strategy, the in-depth interviews carry an interpretive perspective, which is by its nature is primarily subjective and employs an inductive theory development approach. Limitations to the in-depth interview method were also discussed. The primary data collection method was the interviews, and the rationale explained for a sample selection of seven participants in the Irish out-of-home advertising industry. A thematic approach was discussed in terms of analysing the data from the primary research, which will be presented in the following chapter in relation to the research objectives outlined in Chapter 3. Next, in Chapter 5, the research findings will be examined, followed by Chapter 6, in which the findings will be discussed and related back to the research from the literature review to consider the implications and draw conclusions.

Chapter 5: Findings and Analysis

5.1 Introduction

The purpose of this chapter is to capture the data collected from the in-depth interviews, including direct interview quotes. Where a verbatim quotation of an industry practitioner is used, it is indicated with quotation marks, and identified by the number of the participant, i.e. “P1” refers to participant 1, and “P2” refers to participant 2 and so on. Where words were added to the verbatim quotations in order to enhance understanding, they are placed in parenthesis. In line with each research objective, recurring themes are identified which demonstrates the core findings. These are presented in the table below, corresponding to the objective that they are affiliated with:

Table 2: Digital Out-of-Home Advertising Themes

Objectives	1. Practitioners’ Opinions	2. Challenges Faced	3. Influence to Incorporate
Theme 1:	Flexibility/Reactivity	Insufficient Measurement	Motion/Animation
Theme 2:	Premium Format	Lack of Education	Multiple Creatives
Theme 3:	Dynamic Capabilities	Creative Inefficiency	Location

5.2 Objective 1

To assess the opinions of industry practitioners of digital out-of-home advertising in comparison to traditional out-of-home advertising.

Each interview participant was asked for their views as to how digital out-of-home has changed what out-of-home advertising can now offer to clients, and their own personal opinions of the medium. Themes emerged from the responses that identified substantial differences between digital and traditional out-of-home and how practitioners feel it benefits out-of-home as an advertising medium. The themes are flexibility, premium nature and dynamic capabilities.

5.2.1 Theme 1: Flexibility

Out-of-home advertising has long been associated with long-lead times and rigid advertising ‘cycles’ (these are two-week periods in the Irish market). Participants agreed that with digital out-of-home, the medium has a whole is now considered more flexible:

“When we are looking at campaigns with clients there is always the lead time, so you have to do something two-three weeks in advance, or even six weeks in advance, to get artwork, to get things signed off and everything. But when you are looking at digital – its instant. So, you could come to us before the day before you want a campaign to go live – and it can go live the next day, or on that day, or within the hour, so its instantaneous which has really changed the way I think we’re going to plan outdoor going forward” (P1);

“We used to be known as really ‘hard to fit into different dates’ because out the out-of-home cycles – so therefore not so flexible – and digital out-of-home has really changed people’s opinions on that” (P7).

Now, with digital out-of-home, one respondent remarked on just what this means for the perception of medium; *“out-of-home is the oldest medium, but we are now as reactive as one of the newest mediums” (P6)*, adding that, *“out-of-home campaigns do the brand building, the awareness and the reach, but now you can also can do it reactively – which wasn’t possible when your campaign fell outside of the cycle dates or was pre-planned” (P6).*

Respondents also expressed that due to the long lead-time associated with traditional out-of-home, and even when advertisers book a normal two-week ‘cycle’, there are often still concerns expressed by advertisers – as is it near impossible to determine and control when exactly all of campaign will be posted and removed by;

“The fact that you can be so reactive – you can switch it on immediately, you can switch it off immediately, that’s the biggest selling point for a lot of client – with traditional outdoor, it’s up for two weeks and realistically it might not actually go up until the Tuesday and it might not come down until the Wednesday – it’s not as flexible, you cannot say I need this turned off at 4 o’clock this day, whereas with the digital you can” (P3);

“We are getting more last minute by the day, so we are literally getting ads in the morning that can go out in the afternoon, sometimes if you say to someone you have to print posters, and it’s going to take up to another week to install them – they just say no, they haven’t the time for that” (P4).

Not unexpectedly, with this new flexibility, participants acknowledged the added benefits this brings to the out-of-home industry, such as being able to book last minute campaigns and, thereby, open up out-of-home advertising to advertisers with smaller, low budget brands;

“The aim would be that we become so flexible that we take last minute budgets into digital out-of-home” (P2);

“Smaller brands can come to the table – they don’t have to have a huge pot of money – they can use their budget cleverly doing things like time-targeted, copy rotating media” (P5).

While discussing about the flexibility/reactivity of digital out-of-home, a number of participants mentioned how digital out-of-home opens up the out-of-home industry to “steal money a little bit from digital online” (P7);

“I think in the past out-of-home has always been seen as very kind of traditional, and it’s always been seen as a very broadcast medium, but with digital out-of-home has allowed us to kind of play in that online space now, we can react quickly to what’s going on and get last minute campaigns in, taking budget from online” (P2);

One respondent stated that; “digital outdoor now has more in common with the internet than it does with a poster – but you’re actually reaching an additional audience because it’s people out-of-home” (P6).

It was also noted by participants that in times of crisis the flexibility/reactivity of digital out-of-home is paramount when compared with traditional out-of-home as it can be changed quickly – giving advertisers peace of mind;

“We literally could get a call saying I have to pull everything from tomorrow onwards, and with traditional outdoor, you can’t guarantee it, whereas with digital you can” (P3);

“Flexibility is really important as well if a brand is in trouble – you can pull down the ad or put a different one up as well – so traditionally we haven’t been able to do that. We have had to have campaigns blanked out – and this can make clients reluctant to go back on it because of that – but now you have that ‘kill button’ on digital” (P6).

It’s clear that flexibility is a key feature of digital out-of-home when compared with traditional out-of-home, thereby opening it up to both new advertisers, and new campaigns that may have otherwise been missed; “I think that flexibility is really

important because the two week cycles can be kind of restrictive to certain people because there's so many more events and things like that on and they don't follow the outdoor cycles, so there can be wastage – so for example, the Vodafone Comedy festival, if that hits in the middle of the cycle what do you do with the second week?” (P4).

5.2.2 Theme 2: Premium Format

In comparison to traditional out-of-home, participants felt that digital out-of-home formats have a premium look and feel. Within the Irish out-of-home market in particular, where there has been significant investment by media owners in digital out-of-home networks over the past two years, participants recognised and applauded the high-quality inventory now in situ and available for sale; *“they're all really premium looking – they appear modern” (P6)*, with another respondent stating that *“the easiest part of selling it is the premium nature of it” (P2).*

Comparing with traditional out-of-home formats, one participant stated that; *“it's a really premium product – it can be very vibrant and it's definitely more eye catching than I would think a traditional 6sheet 'Purchase Point' or 'Adbox' [paper poster formats] would be. You don't have to worry about illumination, with the digital screens it's constantly there” (P7).* Another interviewee confirmed this, adding that: *“if you were to show a client an Adshel [bus shelter] and a digital out-of-home format – they'd always go with the digital out-of-home format, because they're newer plant, they're higher quality, and the fact that they are more captive and engaging – they will capture your attention” (P3).* Additionally, in comparison to traditional out-of-home, one respondent remarked on the natural occurring damages that happen with paper formats outdoors; *“they [digital out-of-home screens] don't get damaged, with a 48sheet [standard billboard] poster – you might find that it's been torn, or graffiti written on it, so we don't have that same issue with digital out-of-home, which why I think some advertisers don't like some of the older formats for that reason” (P6)*

As already mentioned, traditional out-of-home is synonymous with paper posters, therefore, according to one participant, digital out-of-home represents “*a modern way of doing what was always there*” (P4), and is of the belief that the quality of digital out-of-home could be correlated to other media; “*high definition magazine quality that you can now get on HD screens*” (P4).

The opinion that digital out-of-home formats were top-level premium was firmly established amongst participants, with one relaying that this is perception that advertisers have as well; “*clients look at them as premium*” (P1). However, one respondent commented that the premium nature of digital out-of-home is not without its drawbacks; “*price has been a topic of conversation for a while now, it is seen as quite expensive*” (P2).

5.2.3 Theme 3: Dynamic Capabilities

The dynamic capabilities of digital out-of-home enable screens to carry third-party content – and such allow for the creation hundreds of pieces of copy for one campaign to provide relevant customised and attention-grabbing content, linked to the likes of location, weather and social networks. One participant stated that “*the whole dynamic area creates that additional cut through then what you would get with just a normal ad*” (P2). Another participant offered an example of this; “*I think that dynamic is amazing in terms of being able to give them [advertisers] this huge creative scope to be clever in their advertising – I think what’s great is that thing of being able to contextualise advertisements really highlights that call-to-action, so it’s ‘Hey Dundrum, Easons is on the top floor’ – instead of just ‘Easons’ – and the consumer saying ‘I don’t know where that is’, you’re now telling them what to do and where to do it*” (P4). The participant described this contextualisation ability of digital out-of-home through dynamic as “*changing it from wallpaper to something quite clever and really effective*” (P4).

One participant perceived that, while the dynamic capabilities of digital out-of-home are unique and revolutionary, audiences expect such sophistication from the advertisements

they see; *“I think the dynamic platform is really good because it can do things such as have criterion planned, like if A & B team win then X creative is pumped out etc. and that’s where digital out-of-home is a game changer because there isn’t really anything else like that out there. However, people expect advertisers to be trying to interact with them, they’re really savvy people – I don’t think anyone gives people enough credit – we have all become very digital savvy people and people expect that from advertisers – so they need to deliver it”* (P7).

While participants agreed that the concept of dynamic digital out-of-home campaigns were second to none, they also felt that it was relatively new, as participant suspects that *“dynamic is something that’s really going to be big in the future”* (P1).

5.3 Objective 2

To understand the challenges faced by industry practitioners when planning digital out-of-home in out-of-home advertising campaigns.

Digital out-of-home is the newest advertising format being planned into out-of-home advertising campaigns. Compared to traditional out-of-home, the themes identified from the findings that practitioners come up against as challenges are insufficient measurement, lack of education and creative inefficiencies.

5.3.1 Theme 1: Insufficient Measurement

There was a commonly held view amongst respondents that there is insufficient measurement available for digital out-of-home advertising. It was also evident that the inability to measure the format is a growing area of concern and is constantly being challenged by advertisers. Respondents illustrated that this challenge places digital out-of-home at a disadvantage due to the fact that, currently, in the Irish out-of-home market, a measurement consisting of reach and frequency figures can be acquired for traditional formats at the planning stage of an out-of-home advertising campaigns. Such a

measurement is not available for digital out-of-home. The existence of such a challenge is not commonly acknowledged in the literature, suggesting there is validity in the proposition that there is a gap in understanding the perspectives of industry practitioners:

“Clients are always looking for how many people did it reach, what was the coverage, which you can provide with 48s, billboards and things like that, or roadside formats – using JNOR [Joint National Outdoor Research, which provides net audience figures, opportunity-to-see and visibility-adjusted-contact] – but with digital we have no way to give them a result – so how many people actually saw the ad, to know how long people stood and watched it. The only thing we can provide really is footfall figures” (P1);

“It doesn’t give a coverage figure – which is hard. I would have a lot of clients that would buy by coverage and frequency, and we can’t quantify that. So, we can give footfall, but it is a very rough and crude figure – ‘this amount of people in an average month that walk-through Dundrum Town Centre’ – so out of that footfall, how many of them are your target market – we have no clue” (P7).

With the level of measurement associated with online digital advertising, one respondent flagged this as a planning challenge – as it is a measurement that advertisers are used to receiving; *“we can’t plan it on it based on impressions the way we do with digital [online], or based on how many people were guaranteed to see it – we need some kind of metric to be able to say this is the amount of impressions that is served or buy based on impressions – so like the way would buy digital [online], we might buy a million impressions over the course of two weeks say for example on a newspaper website. If we could do something similar with digital out-of-home where we can say you’re guaranteed to hit a million impressions or a million people over the course of however amount of days, it would make it a little bit easier” (P3).*

Overall, participants were anxious that a measurement system would be established for digital out-of-home, similar to that currently used to plan traditional out-of-home

advertising campaigns. One respondent noted that: *“because of the lack of planning, cover and frequency and all that – digital out-of-home it is kind of a black spot on a plan”* (P5). There was a noticeable sense of discomfort amongst some practitioners, as without any metrics, already some clients are beginning to remove digital out-of-home formats from out-of-home advertising plans:

“With some clients who are highly audited – immediately they are saying ‘I can’t spend €30,000 if I can’t get a measurement to justify it’ – so that would come off the plan” (P2);

“We have loads of clients that would say no to digital because they don’t have a figure – so even though we would give them a footfall figures or basket numbers or all of that – they just say ‘because I can’t get a percentage of my target market that I’m reaching, I therefore don’t want to put it on the plan” (P7).

Respondents predict that digital out-of-home will continue to grow over the next few years, and with no meaningful and hard measurement available to make a compelling case for including digital out-of-home as part of the overall advertising plan, there is a real risk that this could frustrate this anticipated growth; *“we are estimating that about 25% of the market will be digital by the end of 2019 – so if you think there potentially could be 25% of your out-of-home plan that you have no audience measurement figures – you would ask, ‘why am I investing in that?’”* (P6). Highlighted by one respondent was that this is global industry problem; *“It’s not something that available in other markets either – as a global industry, we are going to have to do something about it”* (P7).

5.3.2 Theme 2: Lack of Education

All participants emphasised that within the Irish Market, there is still a job to be done in terms of educating the media industry to understand and appreciate the opportunities that digital out-of-home has to offer; with one participant revealing that; *“I have yet to have a client that uses digital out-of-home properly. No matter how many times I try, it’s*

like banging your head against a wall” (P3). It’s a work in progress; “they [advertisers and agencies] don’t really know all the benefits of the digital format just yet, we’re still educating them every day on that...we are constantly setting up meetings to go and discuss digital and its strengths” (P1).

Industry practitioners are anxious for advertisers to fully understand the real capabilities and potential of digital out-of-home – specifically features such as flexibility and creativity were noted amongst respondents – even comparing it how online advertising is understood;

“I think, somewhat, clients just don’t really understand enough about it – so are just leaving it off” (P4);

“A lot of clients haven’t been educated on the fact that they can post reactive activity [send creative to digital screens instantly] on digital outdoor” (P3);

“We need planners to think about digital out-of-home in the same way that they think about digital online; that they can react, they can be creative with their messages, it’s not a paper poster anymore, it’s not just one message for two weeks – they can change it as much as they want” (P2).

One participant observed that it should be viewed as a key component thought of an overall media campaign; *“they’re trying to box it into out-of-home instead of actually looking at it and saying ‘what is the purpose of this on my plan’ when it shouldn’t be used like that – it should be ‘ok we’re trying to target retailers, or target people doing their shopping – what message do we want to put on that, what message are we trying to get across’ or ‘ok we’re trying to target commuters because they’re very busy people and they only have a certain amount of time that we can reach them in and people tend to think about certain things on their commute home – so we’re trying to reach them here – that’s the point of it the message needs to have that relevance” (P7).*

All participants in some manner recognised the need for further education, as without this, digital out-of-home won't be utilised correctly by taking advantage of all its capabilities, thereby diluting the value the format can contribute to traditional out-of-home.

5.3.3 Theme 3: Creative Inefficiency

Whilst all respondents agreed there was education of the advertisers required in order that they fully understand how all of the unique features and capabilities of digital out-of-home can contribute to traditional out-of-home campaigns, a further theme emerged out of this – *creative inefficiency*. The perception is that as advertisers are not being educated, the knock-on result of this is that neither are their creative agencies:

“I don't think that clients are utilising digital out-of-home the way that they should, I think they are just seeing it as an extension of their outdoor campaign. Therefore, they are briefing creative agencies as such, saying 'the assets that have been created for outdoor, just stick them on the digital formats' which is such a waste. We say to clients now both when they brief us, and when we respond back to that brief, what we recommend – saying 'here are all the different things that you need to consider when you are looking at your creative' – the same way you wouldn't just stick your outdoor creative on a social post, we say that your creative should be specific to the individual channel” (P3).

Many agreed that with the continued expansion of digital out-of-home inventory, it is prompting a relationship to form with creative agencies – which never would have been the case when there was only traditional out-of-home formats on the market; *“usually we would focus on clients and media agencies but this year we have included creative agencies in terms of that education piece as well because we obviously need their buy in” (P2)*. One respondent alluded to a specific example of such creative inefficiency; *“in Connolly train station – there are 12 digital screens in row – you can do content that looks like it's jumping from one screen to another, or you can have different creatives, so*

say for example a juices brand, you could have a different variety or flavour on each screen, whereas we are seeing them put the same design on the 12 screens” (P1).

While some felt that this relationship, and subsequent educating, had started with creatives; *“we do a lot of workshops, and we’ll be doing reviews for the year where we show examples of good creative, bad creative, what can be done better. We’re out meeting creative agencies a lot more – so there is a lot more of a relationship building happening” (P1);*

However, participants identified potential barriers to this;

“We don’t want to step on creative agencies toes – we will say to the client, look that creative is not right for a digital format, if your creative agency can’t do it for you, let them give us the assets and we will change it – but they don’t because they don’t want to annoy the creative agency off by letting someone else do the creative, that’s their job. It’s a bit of sore topic” (P3);

One respondent explained that this service offered to alter the advertiser’s creative instead of their creative agencies; *“our designers are really good at digital out-of-home creative, as 100% of their time is out-of-home and 100% of their time is design – so of the stuff that they have done for clients is amazing versus the stuff that is coming out of creative agencies – probably because they just don’t understand how the format is consumed” (P4).*

Another interviewer offered that, in the case of utilising the dynamic capabilities of digital out-of-home; *“they are very protective over their creative, so for us to do a dynamic campaign, we need to take ownership of the creative - the only thing that we get off the creative agency is a template, and all of the changes, be it the weather, the text inside, any social feeds, we monitor and we manage – so it’s getting them to break down the walls a little bit, get the control a little bit off them” (P1).*

This creates a significant challenge for practitioners, as they want advertisers to use digital out-of-home to its full potential in order to warrant repeat investment resulting from successful campaigns. Supporting this, one respondent justified the reasoning behind sometimes having to bypass creatives; *“we’re doing it to push our medium – to make it look better. We’re trying to sell a medium to other clients as well”* (P7).

5.4 Objective 3

To identify how industry practitioners influence advertisers to incorporate digital out-of-home into out-of-home advertising campaigns.

Several common themes materialised from the data gathered which highlighted various influential factors that industry practitioners advocate for in order to sway advertisers to incorporate digital out-of-home into their out-of-home advertising campaigns – thereby enhancing campaigns beyond what traditional out-of-home could offer by itself. The three main themes identified from the findings are motion/animation, multiple creatives and location.

5.4.1 Theme 1: Motion/Animation

Unlike traditional out-of-home, digital out-of-home gives advertisers the opportunity to incorporate moving advertisements into their out-of-home campaigns. Multiple participants expressed reasoning for why this is an element of digital out-of-home that they promote in order to encourage advertisers to use digital out-of-home advertising;

“The copy is moving content, which is very strong. We have done research on outdoor where moving content catches the eye, so you are kind of guaranteeing more eyeballs when running digital” (P1);

“The biggest thing that we find advertisers veering towards nowadays is the fact that it can be animated, so it’s a bit more eye catching and then even in terms of

recall we have found that it's a bit more effective and people will actually remember it more than they will with just static outdoor image – so that's usually why would try and incorporate it" (P3);

"Any sort of animation, particularly with kids – you see kids actually running up to the screens and it's great to see that, you want that interaction" (P7).

With motion/animation in mind, several participants singled out one category in particular, that is, the film industry;

"For films, there is now the opportunity to show the trailer – so you're not just using one frame – you have a 10 second clip of your trailer, that's amazing" (P4);
"A lot of trailers do it really well – where they have got the ad, and use static content just in the bottom half of the screen – because you want to make people see the date that its out and then you have the trailer on top – so it's just thinking a little bit more outside the box on how you use the space – you only have 10 seconds" (P1).

It was clear from the interviews that participants perceive the motion/animation aspect of digital out-of-home as an imperative rationale for incorporating it into out-of-home advertising campaigns being that it is something that traditional is not able to offer. As one respondent remarks; *"when are planning digital outdoor, we would bring it in purely based on the fact that it's not static" (P3).*

5.4.2 Theme 2: Multiple Creatives

With traditional out-of-home advertising, a static paper poster is displayed on a site and is (usually) in place for a two-week period. It does not change unless pre-arranged and advertisers are generally charged with a substantial fee due to the time and effort involved.

Piggybacking on the flexible capabilities of digital out-of-home, another theme that evolved from the data gathered in terms of how practitioners encourage advertisers to incorporate digital out-of-home and personalisation into their out-of-home advertising campaigns, is the use of multiple creatives;

“With traditional static formats, when you have your posters printed, they’re done. They have to be ready to go, prepped and posted. With digital you can send us ten creatives – they can be targeted to location, all that kind of thing, so you can take advantage of that” (P1);

“I think that what sets digital out-of-home apart is level of targeting and the creative messaging that you can employ – so time of day, day of the week” (P5).

Two respondents provided an example of such multiple creative use that both could be done, and has been done, coincidentally, both for McDonalds;

“For the likes of McDonalds, it would be unreal – you can do morning messages; having copy [creative] in there for the McBreakfast – each time you can swap it out, so you buy it for the two weeks but have your whole portfolio shown within those two weeks – you can’t do that with static, you would be up and down posting – it’s a manual thing, digital you can just swap in, swap out” (P5);

“For example, McDonald’s did something a few years ago, when nothing dynamic was being done, and they literally just called out ‘Wednesday’s Wrap of the Day’ and people were loving it saying ‘oh my god they have the day of the week on the digital screen’ but it was simple creative and just because they had multiple creatives for each day of the week that corresponded to the actual day on display, they thought it was so thoughtful and clever” (P7).

There was substantive agreement among respondents as to how crucial the use of multiple creatives is to using digital out-of-home correctly and, thereby, not just imitating your

traditional out-of-home creative for digital; *“When we’re out presenting the capabilities of digital out-of-home now we would always say that if you’re planning to use one creative for two weeks you need to think again, you’re not using it right at all”* (P2).

5.4.3 Theme 3: Location

In the Irish out-of-home industry, there is a strong presence of digital out-of-home formats in shopping centres, at forecourts, in bars/pubs and train stations. Respondents recognised that these locations highlight a crucial reason for digital out-of-home to be incorporated into advertisers’ out-of-home campaigns due to their exclusivity; *“they are in places where there is no other advertising formats, so the likes of the shopping centres, there might be stuff in the car park but there isn’t actually anything else there to connect with consumers – they tend to be in locations where traditional out-of-home isn’t available”* (P6).

Particularly within shopping centres, respondents stated how advertisers now can influence consumers at the point-of-purchase, commenting specifically on the dwell time associated with these kinds of commercial environments;

“You can get them on the way into the shop, you can get them on the way out of the shopping centre, the high-dwell time area in the middle of the shopping centre, sometimes advertisers might say it’s too late when they are at the till because they’ve already made their purchase decision, whereas we kind of help them think a bit more by having stuff throughout the centre” (P1);

“Digital screens in shopping centres are at the point of sale which is really important in terms of converting interest to action. They’re in the right environment because you have the audience, you have the dwell-time, and you actually have the space to go and react and buy something – so it makes sense. Advertisers like them, they know that there is dwell-time in those areas, so they are quite happy that they are reaching a strong audience who are in a kind of easy

going frame of mind – they’re not rushed, and they are open to suggestions or new information” (P6).

Although acknowledged by participants the importance of being able to influence audiences in environments where no other media could, overcoming the challenge of creative inefficiency is necessary for advertisers to utilise point-of-purchase digital out-of-home to its full potential; *“Even within the digital formats, whether it’s a retail environment or whether it’s a rail environment, the message should be different because you’re targeting different people. So, the retail environment should be a very retail focused message, the rail might be something to do with your commute home or ‘pick something up when you get home’ or ‘are you tired’ or something that’s shouting out to people” (P7).*

5.5 Summary

By investigating the perspectives of knowledgeable practitioners through these in-depth interviews, it has helped better understand how digital out-of-home advertising contributes to traditional out-of-home and has helped to build on the literature currently available. As each respondent offered their perspective on digital out-of-home advertising, common themes emerged from the data gathered and were subsequently interpreted to satisfy the three research objectives outlined in Chapter 3.

Practitioners’ views of digital out-of-home advertising, when compared with traditional, emphasised its flexibility, premium nature and dynamic capabilities. The challenges faced when planning digital out-of-home into out-of-home campaigns were perceived as insufficient measurement, lack of education and creative inefficiency. By accentuating three factors – motion/animation, multiple creative and location – it was clear how practitioners influenced advertisers to incorporate digital out-of-home into their out-of-home advertising campaigns. The coming discussion in Chapter 6 will examine the findings from the literature review and compare and contrast these with the findings of the qualitative research undertaken.

Chapter 6: Discussion

This research aims to enhance discussion about the phenomenon that is digital out-of-home and to provide insights from which marketing practitioners, researchers and key stakeholders in the out-of-home advertising industry can benefit. The literature indicates that the out-of-home industry has undergone a massive transformation over the last number of years as it entered the digital era. The main research question asks how digital out-of-home advertising contributes to traditional out-of-home advertising and the three research objectives established help to develop the answer to this. This chapter will review the key findings from the in-depth interviews and compare and contrast these with the literature discussed in Chapter 2, so as to consider the implications and draw conclusions.

6.1 Objective 1

As discussed in Chapter 3, the first research objective looks to ascertain the opinions of practitioners regarding digital out-of-home when comparing it to traditional out-of-home advertising. From the analysis of the findings, their opinions of digital out-of-home are found to be its flexibility, it's a premium format and it carries dynamic capabilities.

6.1.1 Flexibility

Not unexpectedly, the findings proved consistent with the literature, with flexibility being universally recognised by practitioners as a distinguishing and current feature of digital out-of-home – a characteristic that traditional out-of-home cannot offer to advertisers, as several respondents referred to the rigid two-week out-of-home advertising ‘cycles’. It is noted in the literature that flexibility benefits advertisers by being able to plan digital out-of-home by the moments, places and times they desire – almost identical to one interviewee describing digital out-of-home as facilitating that “*right time, right place, right message*” (P7).

Burke (2009) and Wylie and Hardy (2017) explained how screens are controlled independently by a computer server, which therefore removes the manual handling from swapping out an advertisement. Also, congruent with the literature, respondents highlighted the fact that this functionality now offers peace of mind to advertisers – particularly in the case of where campaign needs to be taken down immediately – where they had previously expressed concern about the associated lead-times which therefore might see them shy away from using out-of-home as an advertising medium. Respondents also explained that before digital out-of-home, out-of-home advertising would automatically be excluded from any date sensitive campaigns due to the fact it could not be guaranteed that a campaign would be blanked (i.e. posters removed) by a certain time. Now, with the flexibility of digital out-of-home, out-of-home can feature on plans for these types of campaigns much to the delight of advertisers – as they can continue to use out-of-home to generate that awareness and reach, in which Roux (2016) recognises as being a key characteristic of out-of-home advertising; “*its ability to raise brand awareness very quickly*” (p. 185).

6.1.2 Premium Format

Fill (2009) and Cronin (2010) classify traditional out-of-home under a variety of headings – all which comprise of paper poster formats. However, the literature very largely suggest that digital screens have replaced many of these paper poster sites, intimating a higher-quality perception over traditional formats. Dennis *et al.* (2013) discovered from their study that digital signage was perceived as being high-tech and, as a result, attractive. Participants’ views were wholly consistent with these observations; with, for example, one participant commenting that if you had a traditional site and a digital site side-by-side, clients would always go for the digital.

Roux and Van der Waldt (2014) also commented on the look and feel of the screens – promoting the high-quality levels of brightness and screen resolution the format carries. In support of this, for example, illumination was also mentioned by one respondent, boasting how it now wasn’t a factor to worry about when planning an out-of-home

campaign, by implication, suggesting that it is an issue with traditional low technology approaches.

6.1.3 Dynamic Capabilities

The dynamic capabilities of digital out-of-home were a feature of the format which practitioners felt particularly passionate about. As Koeck and Warnaby (2014) mentioned, this technology is allowing for digital out-of-home to provide a more interactive experience. Both the literature (Bauer and Lasinger 2014; Roux and Van der Waldt, 2014; Ocean Outdoor, 2016) and the interview results agree that dynamic campaigns provide additional cut-through to consumer over a one-way static advertising message. The literature suggests the content published with dynamic features, such as real-time weather or traffic updates, is allowing digital out-of-home to be more engaging than traditional; providing advertisers with the tools to be cleverer with out-of-home campaigns than they could be using static posters (Bauer and Lasinger 2014; Fisher, 2017). Respondents commented specifically on the location-callout capabilities of how a dynamic campaign can bring life and action to a campaign, particularly in a retail environment where you can now direct people to a store, something that couldn't be achieved at the same level and quality with traditional out-of-home.

The literature noted a forecasted increase in the implementation of dynamic campaigns, specifically with clients referring to their own data sources (Posterscope, 2018) which one participant implied would be similar for the Irish out-of-home industry as advertisers they consider them as relatively new territory. Interestingly, what was revealed in the findings, but not apparent in the literature, was how these dynamic capabilities are unique to digital out-of-home – so not only can traditional out-of-home not facilitate the campaign, but other media is currently offering anything of the sort.

6.2 Objective 2

Objective 2 seeks to understand the challenges faced by industry practitioners when planning digital out-of-home into out-of-home advertising campaigns. The three main challenges that arose from the findings were; insufficient measurement, lack of education and creative inefficiency. This objective proved valuable in terms of both the actual challenges that were brought to the researcher's attention and for further research opportunities, as the literature rarely addresses challenges relating to digital out-of-home, therefore suggesting a potentially significant gap which would benefit from being the subject of future research.

6.2.1 Insufficient Measurement

Practitioners were unanimous in the view that the out-of-home industry needs to establish a viable measurement method for digital out-of-home. With average footfall figures being the primary statistic available for practitioners to provide to advertisers as part of campaign plans at this moment in time, practitioners stressed the need for a measurement system equal, at least, to what they can currently provide with traditional formats, chiefly coverage and frequency. Without such numerical justification, digital out-of-home is seen as a "*black spot*" (P5) on out-of-home advertising plans, leading to questions as to why one should invest heavily in a format where they have no real idea of the reach they are achieving. What one participant perceived as producing a "*crude figure*" (P7), JNOR (as referred to by respondents) at least allows out-of-home campaign plans to be measured to a point. However, regrettably, when the talking point of digital out-of-home should be its unique benefits, advertisers tend to be fixated on this weakness, which presents a significant challenge for practitioners. One respondent suggested that this may be a global industry issue, given the view that other markets experience the same difficulty, and therefore was forthright in their view that a viable measurement method for digital out-of-home must be developed.

As the literature recognises, there have been studies focused on consumer reactions to

digital signage such as Newman *et al.* (2010) who revealed that consumers perceive brands as more modern and therefore think of them more positively, this is not a sufficient means of measurement that can be implemented at the planning stage of an out-of-home campaign.

6.2.2 Lack of Education

The research highlights lack of education as a challenge, however, the issue is likely to be somewhat specific to the emerging 'digital' Irish out-of-home industry. This challenge is pressing and must be led by the industry now that the available digital out-of-home inventory is growing rapidly following investment, as evidenced by Core (2018) – Ireland's largest marketing communications company. This too highlights a potential future area of useful research; investigating further advanced digital out-of-home markets as to whether practitioners in these markets now perceive that advertisers both understand and use digital out-of-home to its full potential.

The practitioners interviewed were of the view that advertisers don't fully understand all the capabilities of how digital out-of-home can work, thereby were lacking understanding as to how it can contribute to their traditional out-of-home advertising. As Roux (2016, p. 198) addresses the role of out-of-home in IMC campaigns; "*failure to appreciate the uniqueness of the features and of what these platforms have to offer will result in a lack of understanding of all potential roles they could play*". The findings suggest that, overall, respondents will experience the same gap in understanding with regards to digital out-of-home.

6.2.3 Creative Inefficiency

Again, however, to a lesser degree, the researcher would like to recognise that it is likely that this challenge is also related to the emerging 'digital' Irish out-of-home industry and for the same reason that the available digital out-of-home inventory has risen rapidly. This too offers a potential viable future avenue of research.

This challenge, as suggested from the findings, goes hand in hand with advertiser's perceived lack of education, as was highlighted by interviewees. Bold (2008) identifies that with the unique capabilities that digital out-of-home can offer – particularly dynamic – it has allowed the medium to situate itself similar what digital *online* can offer – recognised primarily by respondents due to its flexibility and subsequent reactivity. However, respondents made the comparison between the creative education challenge that needs to be addressed for digital out-of-home and the issue that materialised back when digital online advertising was a relatively new advertising medium; *“I genuinely think that there has been so much emphasis over the past five years on people getting so up to speed on digital online, so they, they know what creative works, they know whether it's banner ads or what parts people don't see of a certain screen, so creatives have really gotten a handle on what works and what doesn't – I think it's easier for them to look at a bsheet and go right well we will just make that a static ad – so there is definitely an education piece from a creative point-of-view”* (P7).

Franch *et al.* (2013) feels that the reason there is creative inefficiencies is due to the expense involved in creating separate creatives for digital out-of-home and traditional out-of-home, which is furthered by the lack of data to showcase the effectiveness of doing so. By overcoming this creative inefficiency challenge, respondents agreed that it would an important step towards advertisers utilising digital out-of-home to its best potential.

6.3 Objective 3

The final objective sought to identify how industry practitioners influence advertisers to incorporate digital out-of-home into out-of-home advertising campaigns. The three main approaches to be discussed are motion/animation, multiple creatives and shopping centre location.

6.3.1 Motion/Animation

Both the literature (Koeck and Warnaby, 2014) and the interview findings agree that movement is an important factor for advertisers to include digital out-of-home in the out-of-home campaigns, as traditional formats will always be static. One participant mentioned that their place of work had carried out research on a number of digital out-of-home campaigns also confirming that moving content catches the eye, therefore “*guaranteeing more eyeballs*” (P1). Participants in general felt that having animation incorporated into creative led to more traction, consistent the views of both Muller *et al.* (2009) that it stimulates greater audience interest, and Koeck and Warnaby (2014) who declare that it is more effective in capturing the attention of passers-by.

The manipulation of other medias content, such as television and cinema trailers, was recognised by the findings and the literature (Roux and Van der Wald, 2014) as now ultimately being suitable for out-of-home because digital can facilitate motion, which Muller *et al.* (2009) believe should encourage advertisers to convert their messages to be suitable for display on digital out-of-home. Findings such as this would lead to believe that Ocean Outdoor (2016) are likely to be correct in their predication that digital out-of-home will continue to grow, especially if it can it open the doors for advertisers to move from one media to digital out-of-home.

6.3.2 Multiple Creatives

The findings highlighted that the ability to have multiple creatives as part of a digital out-of-home campaign was a major factor in contributing to why it should be included in out-of-home campaigns – as with traditional out-of-home one may have had different creatives, however never on the same site. Piggybacking on the flexibility of the format, as recognised by Roux and Van der Waldt (2014) and Clohessy (2017), the findings observed that in the case for certain advertisers they could effectively showcase their entire product portfolio across a campaign.

A major element that both the findings and the literature agreed on and again highlighting the flexibility of the format, was that being able to display multiple creatives should encourage advertisers to customise their creative for the both the day of week, time of day, etc. (Tam and Ho, 2006; Clohessy, 2017) and also for the environment that they will play out in – targeting for specific audiences as pointed out by Roux and Van der Waldt (2014). The literature suggests that this will lead to a contextual connection being generated with consumer – as it resembles what is actually happening (Roux and Van der Waldt, 2014; Clohessy, 2017). One respondent mentioned that they are stressing to advertisers that if they are just using one piece of creative on digital out-of-home, then they are using it wrong, and endorsement of this important message.

6.3.3 Location

Interviewees stressed the importance of the location of the digital out-of-home screens currently available in Ireland as they are occupying areas that have no other out-of-home advertising. Whereas, for example, Roux and Van der Waldt (2014) mentioned that it is traditional sites are giving way for digital screens. Contrary to this, the Irish experience would suggest that there has not been significant cannibalisation of traditional formats for digital formats in the Irish out-of-home industry at this moment in time.

Burke (2009) acknowledges that retail shopping environments that carry digital out-of-home networks are offering an important channel for advertisers to communicate with consumers. The findings acknowledge and concur with this, particularly because there is no other out-of-home present in these shopping centres, so it's an ideal way for advertisers to connect with shoppers. The observation offered by one respondent, was that, with these digital out-of-home networks in shopping centres, advertisers now have the opportunity to target the consumer at multiple points throughout their time there (due to multiple screens throughout), implying that when the consumer actually arrives at the point-of-purchase it may be already be too late to influence them. The literature actually contradicts this, as Roux, 2016 believes that the advertisement should be as close as possible to the

point-of-purchase so that consumers would be more likely to remember it, and therefore influenced by it.

Both the literature (Roux and Van der Waldt) and the findings reflect on how due to the locations of digital out-of-home advertising, advertisers now have the opportunity to target audiences with the relevant customised messages, however, respondents noted that this challenge of creative inefficiency needs to be address in order for advertisers to utilise properly.

6.4 Conclusion

The key findings from the research together with the body of literature, has allowed the researcher to materially answer the three research objectives outlined in Chapter 3. The discussion presented in this chapter represents how the findings from this research enrich the body of knowledge on the phenomenon that is digital out-of-home advertising.

The unique features of digital out-of-home, as determined by the literature are motion/animation, flexibility and dynamic capabilities. The research shows that practitioners too recognise these as significant features, with the caveat that they perceive that incorporation of motion/animation is a crucial factor in influencing advertisers to include digital in their out-of-home campaigns. The findings also underpin that digital out-of-home is viewed as being premium in nature. Whilst this is a factor referred to in the literature, the emphasis placed is not at the same level as that evident with practitioners interviewed. The challenges identified of a lack of education and creative inefficiencies from the findings highlight the infancy stage the Irish out-of-home industry is at in terms of utilising digital out-of-home to its full potential. The lack of measurement was a challenge that practitioners felt strongly about, suggesting it should be addressed on a global scale. Lastly, in addition to motion/animation, practitioners perceived the ability to use multiple creatives and the physical location of digital signage in the current Irish market are critical factors for advertisers to consider as to why it should be incorporated into their out-of-home advertising campaigns.

6.5 Limitations of the Study

The main limitation with this study is the size of the sample. This is largely attributable to both time and access restrictions. As a consequence, the sample extended to just seven participants. However, on the other hand, the use of qualitative research methods will have helped to generate findings that are relevant, useful and valid. The participants selected for the study were also chosen based on the criteria outlined in Chapter 4, Section 4.6.1, and therefore the findings are based on the views of Irish out-of-home industry practitioners from five companies. While this may not be wholly representative of the Irish out-of-home industry in its entirety, the explorative nature of the study suggests that the findings can be applied to a different sample for testing their success.

In summary, the three unique features of digital out-of-home as depicted above, which emerged from the research findings, are consistent with the literature, with the exception that the challenges practitioners face when planning digital out-of-home into out-of-home campaigns are not explicitly referred to.

Chapter 7: Conclusion

The intention of this study is to discover how digital out-of-home contributes to traditional out-of-home advertising. Through conducting in-depth interviews, the research sought to determine the opinions of practitioners of the format, the challenges they face when planning digital out-of-home into out-of-home campaigns and identify the elements practitioners consider relevant in order to encourage advertisers to include digital out-of-home as part of their out-of-home campaign plans.

The methodology directed the procedure for investigating how practitioners perceive digital out-of-home advertising as part of the out-of-home industry. The in-depth interviews defined the scope of the study which employed a qualitative outlook to conduct the primary research on the phenomenon. The limitations of the study were recognised, including the small sample size. This overarching methodology helped to counteract any risk to the quality of the research. Recommendations for further research were briefly mentioned in the discussion and are addressed in total in section 7.1.

An extensive review of the literature highlighted the expansion of the out-of-home industry into the new and evolving digital era. Several key authors have substantially contributed to the literature on the phenomenon including Taylor *et al.* (2006), Koeck and Warnaby (2014), Roux and Van der Waldt (2014) and Roux (2016), all of whose work has been accessed as part of this study along with many other academics. The literature begins by critically analysing the transition of the traditional out-of-home industry to digital, and what may the future may exhibit. While academics collectively appreciate there are unique features of digital out-of-home advertising, they fall short of acknowledging how practitioners are managing these as part of overall out-of-home campaigns – with no suggestion of challenges faced, something that is usually inevitable with a new media format, highlighting a significant gap in the research. Moving/animated creative, its flexibility and dynamic capabilities were the primary features identified in the literature as being unique to digital out-of-home. Also considered was its ability to influence at the point-of-purchase. A drawback identified with out-of-home advertising

was that it is considered a medium at a glance, which the literature contradicts when discussing digital out-of-home, as many are located in high-dwell time locations, rather than on routes. Evidenced throughout the literature is how academics have thus far researched primarily consumers responses to digital out-of-home, which is why this study approached the research questions from the viewpoint of practitioners.

In order to satisfy the three research objectives, themes were identified and interpreted from in the findings, then compared and contrasted with the literature. The first objective sought to assess the opinions of industry practitioners of digital out-of-home when compared to traditional out-of-home. The opinions were overwhelming positive, highlighting how digital out-of-homes unique features are assisting to transform the perception of the out-of-home industry; namely its flexibility, that it is a top-level premium format and that the format can facilitate dynamic campaigns.

The second objective was aimed at understanding the challenges that industry practitioners face when planning digital out-of-home in out-of-home advertising campaigns. Three challenges were ascertained from the findings; insufficient measurement, a lack of education and creative inefficiencies. The insufficient measured available was concluded as a global industry problem that the literature failed to acknowledge. It was determined that both the lack of education and creativity inefficiency are likely to be sensitive to the Irish out-of-home industry as practitioners perceive it to be in the early stages of its digital journey, due to the rapid growth over a short period of time.

Lastly, the third objective set out to identify how industry practitioners influence advertisers to incorporate digital out-of-home into their out-of-home advertising campaigns. Practitioners advocated the use of motion/animation, multiple creatives and the physical location of the digital screens in the Irish market as crucial reasons for advertisers to implement it as part of their out-of-home campaigns, each adding significant value to what standalone traditional out-of-home advertising can offer.

This research has highlighted a very positive perception of digital out-of-home held by respected industry practitioners. It has also helped to surface the challenges faced and spotlights the innovative approaches to encourage advertisers to utilise digital out-of-home and optimise its potential. Overall, the literature and findings agree that digital out-of-home positively contributes to traditional out-of-home advertising campaigns. Furthermore, and from an Irish industry perspective, both increased education and the availability of viable measurement capabilities should help the digital out-of-home market potential being fully realised.

7.1 Recommendations for Further Research

The present research has drawn attention to further research opportunities on the phenomenon of digital out-of-home advertising. The findings have highlighted the need for a meaningful industry wide measurement to be established for digital out-of-home advertising, as practitioners are currently challenged by advertisers as to how effective it is – so that they can see the benefit quantified to encourage including it in out-of-home advertising plans.

As the literature highlighted the gap of the perspective of industry practitioners, a worthwhile future research agenda would be to investigate other out-of-home markets, who are more/less developed than Ireland in terms of their digital out-of-home inventory in comparison to traditional formats so as to better understand how advertisers in those markets are using digital out-of-home advertising.

Appendix

Interview Guide

- Why do you think advertisers incorporate out-of-home advertising in as part of campaigns?
- What is the role of out-of-home advertising in your opinion?

(a) To assess industry practitioner's opinions of digital out-of-home advertising.

1. There has been huge investment across a number of out-of-home media owners in Ireland in digital networks in the last eighteen months, how, in your opinion, has this changed what out-of-home advertising offers to clients?
2. What is your opinion of digital out-of-home advertising?
3. What do you think is the best thing about digital out-of-home?
4. What are the easiest parts of digital out-of-home to sell?

(b) To understand the challenges faced by industry practitioner's when planning digital out-of-home in advertising campaigns.

1. What are the hardest parts of digital out-of-home to sell?
2. What do you think are the drawbacks of digital out-of-home?
3. What barriers do you come across when planning digital out-of-home into out-of-home plans?
4. Do advertisers ever remove it from plans because of these barriers?
5. What would make it easier to sell – is there something missing from digital out-of-home that is used to sell normal outdoor?
6. Are there any features missing that clients have requested?
7. Do you think that digital out-of-home is expensive? Is this justified versus traditional out-of-home?

8. With the qualities were already mentioned about digital out-of-home, do you think advertisers are embracing these? If not, are there any factors restricting this?
9. Is there an appetite for more digital out-of-home formats?

(c) To identify how industry practitioner's influence advertisers to incorporate digital out-of-home into out-of-home campaigns.

1. Why do you think digital out-of-home should be included on out-of-home plans?
2. What feedback do you get from advertisers on digital out-of-home?
3. How do digital out-of-home briefs differ to traditional out-of-home?
4. What is your opinion on the current locations of digital out-of-home screens?
5. What is your opinion of digital screens in each of these locations?
6. Do you find many of your clients specifically request digital out-of-home as part of their campaigns – do any want *only* digital?
7. Do clients ever request research to justify putting digital out-of-home on to plans?
8. Traditionally, outdoor campaigns are booked in two-week cycles, however with digital that doesn't have to be the case, what is your opinion on this?
9. Do you think digital out-of-home opens up the opportunity to move money from other media on to digital out-of-home?
10. In your experience, do advertisers put aside budget to allow for reactive campaigns to news, weather etc.? Do you feel if there is any such budget it automatically goes straight to social?
11. What would help digital out-of-home come to mind first in this case?
12. Traditional outdoor is notoriously targeted – do you think this is the same with digital out-of-home?
13. What way do you see the format going?
14. In terms of dynamic digital out-of-home campaigns, what is your opinion on these? (Such as using an API to automate some form of the campaign, such as location callout, weather trigger campaign etc.)
15. Do you see budgets growing? If not, what do you think will stop this? Or what could help?

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