

OUTDOOR ADVERTISING
The Brand Communication Medium

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**OUTDOOR ADVERTISING
ASSOCIATION OF AMERICA, INC.**

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Outdoor Advertising: The "Brand" Communication Medium of the 21st Century
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I. Introduction

Marketers' recognition of the increasing importance of brands as perhaps the firm's most important strategic asset requires a fundamental rethinking of conventional business and marketing strategies. Not only must this re-thinking apply to brand management, but equally as well to brand communication strategies. Successfully managing brands today requires a creative portfolio of relevant media strategies that extends well beyond the "safe bets" of previous generations of advertisers. Today, generating awareness and enhancing an existing image are merely the price of entry to compete in a given market. Today's consumers are yesterday's Generation Xers — complete with short attention spans and the ubiquitous "been-there-done-that" attitude. Spontaneity reigns supreme in leisure activities, music, entertainment and receipt of information. Memory is relative. Something computers have; so, "Why do I need it they ask?" It is against this backdrop of a profound cultural and technology-driven shift in communicating that the media of 21st century are evaluated and that the future of outdoor advertising is presented.

The basic premise of this paper is that layout and design limitations imposed by the intrinsic nature of the outdoor medium frequently requires the creative talent of both the advertising agency and the client advertiser to rediscover the essence of a client's brand. Case histories will be discussed in this paper in the context of: 1) the role of brands, 2) understanding the linkage between establishing brand attitude and advertising, 3) "managing" shifts in brand attitude dictated by consumer trends, competitor actions and/or information processing strategies of consumers. While this paper is primarily about the outdoor medium the discussion takes place in the context of all media. New angles on media usage and perspectives on how consumers are likely to use media in the future are additional topics discussed.

II. The Outdoor Medium: Past, Present, Future

A recent campaign for the outdoor industry touted that "Outdoor is not a medium. It's a large". To this headline we should also add "Right for the Times". The contemporary view of the outdoor medium from a media planner's perspective has evolved over time. Prior to the era of broadcast media, outdoor advertising was the primary medium. After the introduction of radio and later television, the rapid diffusion of these two broadcast media relegated outdoor advertising to being used primarily as a directional medium for local retailers or service providers. Outdoor was also used a complementary medium for national brands to achieve low-cost awareness as part of the overall media plan.

The first generally recognized example of an advertising campaign employing the outdoor medium as an integral element of the overall marketing plan was the Volkswagen "beetle" campaign of the late 1960's. The VW slogans launched more than 30 years ago — "Think Small" and "Avoid Gas Pains" — are still part of the American lexicon today and were pivotal in helping to inculcate the "brand image" of the VW beetle in the minds of the American consumer. More recently, a campaign that positively elevated the awareness of the outdoor medium as a viable alternative for establishing a brand's image in addition to building brand awareness was the 1984 Summer Olympics campaign for Nike. Few advertising campaigns prior to that point in time had achieved pre-campaign advertising objectives in such a dramatic, "media event" fashion as the 1984 Nike outdoor campaign featuring Carl Lewis broad jumping across the LA freeways! Fortunately for the outdoor industry this initial campaign touting the outdoor medium's capacity for developing a brand's image has not been an isolated event.

The outdoor medium has recently been employed as an integral media component in Procter and Gamble's strategy to expand the awareness and sales potential of Pantene shampoo, from a niche brand to a mass market product by formulating a new look for the Pantene brand. P&G's media strategy for Pantene was unique from a package goods marketer's perspective in two respects. Firstly, P&G selected outdoor as the "creative canvas" by which to change the image

of the brand. Normally only TV or magazines would have been considered for this communication task. Secondly, outdoor was used as the lead medium, with other measured media relegated to providing a supporting role. The reported business success of P&G's Pantene brand in terms of both improved brand attitude measures and increased sales not only renewed interest in the outdoor medium, but more importantly caused other media planners to rethink the usage of the outdoor medium in their overall media plans. Additionally, recent articles by Edmondson speaking of traffic patterns, and Reichel & Wood commenting on revised frequency schedules, both strongly favor a reconsideration of the outdoor medium in comparison to other media choices (Edmondson, 1998; Reichel & Wood, 1997)^{1, 2}

As more empirically-based field research is conducted on the outdoor advertising medium, additional research hypotheses are likely to emerge, as well as exploring the plausibility of achieving more sophisticated communication objectives.

III. Lower Costs ... Better Communication!!

What has been overlooked in the current media dialogue is the common misperception that lower media cost naturally equates to better communication. Media planners well-documented preoccupation with lower CPM's has been an advertising industry problem for some time, but there are other problems with measured media as well. A casual dialogue with any consumer today regarding perceptions of various media would likely reveal the following comments: television advertising, while occasionally entertaining is more often seen as mindless and irritating; radio advertising, while timely is too cluttered; magazines suffer from too much "title" fragmentation and are needlessly cluttered with blow-ins; newspapers have grown too large, take too much time to read and older issues accumulate too quickly. Finally, personalized direct mail is increasingly viewed as an invasion of personal privacy. In summary, most consumers today are not hesitant to voice sentiments regarding their general irritation and dissatisfaction with advertising media. More often than not the primary source of advertising irritation for consumers is the receiving of unwanted messages. (Aaker and Bruzzone, 1985)³ The irony of course is that media

planners are typically rewarded on the basis of how many "eye balls" they reach—not whether these consumers wanted to be reached!

But these attitudes toward media have been widely understood for the past decade, the only recent change has been the increasing proportion of people agreeing with various dissatisfaction measures. The same questions...the same answers...nothing really new! The most generally unrecognized media trend is that the majority of consumers today simply have too little time to attend to most forms of advertising — unless they are specifically motivated to replenish stocks. Furthermore, demographic and lifestyle changes over the last half century leave no doubt that time is the most inelastic of all commodities. One of the major reasons for the popularity of the Internet as an advertising communications medium is the (mistaken) perception held by time-pressured consumers that they are recovering "lost hours" by purchasing over the Internet. But the Internet is primarily a transactional sales tool. And while there is some evidence that graphics enhancements may provide some brand building capability in the future, this feature is not the major strength of the Internet medium. It is more clearly an informational and a transaction-facilitating medium vs. a transformational advertising medium.⁴ Transformational advertising is essential to building brands because it implants either a message (or image) about a differential product advantage in the mind of the user.

Transformational advertising is a powerful strategy, but successful execution of a transformational advertising strategy requires frequent exposure over an extended time period — a primary benefit of the outdoor medium.

A time-sensitive evaluation of all media would reveal that the outdoor medium could emerge as the medium of choice for the time-poor consumer in the 21st century. Modern consumers want and actively seek information, but the time-management equation of the future will require that these same consumers will want to expend as little personal time as possible in acquiring information. Media planning is about matching selected media against the target audience. Analogous to team sports, media planning is about key match-ups, and currently no other medium can match outdoor on the brevity of message delivery cri-

terion. In addition, a few noteworthy advertising campaigns suggest that some consumers actually prefer a personalized language code such as Nike's infamous, "Just Do It" campaign. It is therefore not only plausible, but likely, that in the near future the dual thrust of time-pressured consumers demanding more time-sensitive media choices coupled with an era of brand managers increasingly pressured to refresh existing brands are converging toward a message and media strategy emphasizing "advertising as a language code" ⁵. Not only has the Nike example cited above become part of the consumer lexicon, more importantly it delivered increased sales and market share in a big way as well. These pivotal trends— a chronic shortage of time coupled with variety-seeking consumers will dramatically advance the prospects of the outdoor medium against other media alternatives in the future. As an illustration, a billboard posting combined with a vinyl wrapped metro car, reinforced by a transit ad or a taxi poster, reaches the time-starved consumer with much less investment in personal processing time and nearer the point-of-purchase, than other media can deliver. The time-sensitive media selection criterion equation becomes even more favorable for the outdoor industry the further one looks to the future.

IV. Consumers USE Products ...But They BUY Brands!

Why brands? Answer, because brands are the only link between the manufacturer and the consumer. The widespread diffusion of information technology has empowered the consumer in a way that marketers and media alike are playing catch-up to decipher. One key by-product of this "democratization" of the market place is that increasingly consumers are left to make the purchase decision alone —without the assistance of retailers. Reinforcing the point above —brands are the alpha and the omega of marketing in the 21st century. One source refers to the coming battle as brand warfare, where the objective is not to destroy the competitor, but rather to acquire customers by winning over their hearts and minds. (Gilmore, 1999)⁶ Professors Schultz and Barnes have also championed the increasing importance of brands in a modern consumer-driven marketing environment by explicitly recognizing that every consumer oppor-

tunity to see a brand (a.k.a. brand contact) is a form of brand building (Schultz and Barnes, 1995)⁷. Underpinning their thesis is the knowledge that technology has radically reshaped the traditional media landscape; no longer are consumers' information choices limited to traditional media. Rather, a plethora of media alternatives has evolved—including but not limited to: the Internet, vinyl wrapping of vehicles, clothing labels, the omni-present Nike swoosh logo, celebrities and sports stars acting a surrogate billboards for countless brand labels and even body tattooing. The pressure to reach consumers when they are "in the market" has launched a sea of media choices; suddenly every public space or venue is now viewed as an opportunity to build the brand. One of the more novel approaches recently found is a firm utilizing the cursor on your computer screen as a viable advertising medium.⁸

The Emergence of "Philosophy" Brands

"Great brands live forever" is a phrase coined by the famous adman Leo Burnett. But even the great brands and their corresponding images can change over time. It is this domain of brand management where the outdoor medium has perhaps its greatest relevance in the future. Shifting a brand's image in response to changes in competitive rankings or more likely in response to changing consumer lifestyles as mentioned earlier, "guarantees" that the brand remains relevant. The various aspects or elements of a brand must be revised periodically or the brand risks losing its "relationship" with its consumer base.⁹ A recent article observed that successful brands are those that have been able to reinterpret themselves successfully. (Thomkins, 1999)¹⁰. Product-based brands such as Levi's and Kellogg's appear to be especially vulnerable in the future because they can almost certainly be improved upon or they will simply go out of fashion. In contrast, brands that represent a philosophy or attitude toward life are more resistant to competitive challenges and offer more flexibility in terms of adapting to changing consumer tastes. These so-called philosophy brands are unique in that they transcend traditional product/category boundaries—thus opening a vast array of strategic directions for extending the consumer's relationship with the brand. Apple computer's recent "Think Different" campaign¹¹ and Richard Branson's Virgin Airlines, are two such

brands that have successfully demonstrated they are much more about the beliefs that the brand expresses or “brand attitude “ than reliance on tangible product attributes as a source of differentiation. The Apple campaign has not only been a creative success, but Apple Computer’s sales and stellar financial performance since the iMAC launch have been equally noteworthy. Perhaps the best illustration of the impact outdoor can have when it is the centerpiece of a campaign in shifting brand attitude and simultaneously delivering market share and sales is illustrated by the recent campaign for the breath mint candy known as Altoids. The marketing objective of this campaign was to increase market share by first creating awareness and then developing an “attitude” for the previously unknown brand. The quirky campaign was a resounding success with a 12-market national media plan laser-focused on neighborhoods through specific billboards selected by geo-demographic data. (OAAA Case Study) ¹² In short, the brand management task of tomorrow will be more about finding and maintaining a relationship with consumers, rather than sifting through hundreds of plausible forms of differentiation in the hope of finding one that consumers understand, and more importantly value. The trend is clear, brands are growing increasingly important for a number of strategic, economic and practical reasons.

Brand Building — A Strategic Perspective is Essential

A strategic perspective of a business decision advocates that a longer-term time horizon is more relevant for some decisions than the current short-term financially driven performance model. This axiom especially applies to building brands through an investment in advertising dollars. Recognizing that a “brand” is more than a product’s name is a step in this direction. Actually a better way to understand a brand is from a relationship perspective. Every established brand has a multitude of established relationships: with vendors, with the trade, with the media and most importantly, with consumers. Some of these relationships are more important than others, but they all contribute to the success of the brand. Accepting this new thinking; branding first as a marketing function and secondly as an opportunity to deliver consistent exposure to targeted customers — media strategy and decisions once considered as per-

functory tasks — take on additional importance. As an example, Ephron recently revisited the notion of mass advertising with keen insights about some myths that misrepresent the fundamental importance that mass advertising plays in terms of achieving sales. ¹³ It is well documented that traditional media are effective in building brands, but changes in consumer lifestyles coupled with an increasingly cluttered media environment and technological improvements in producing outdoor designs, have collectively elevated the status of the outdoor medium to help build “brands” and “sales” as never before.

A “Wealth” Perspective of Brand Advertising Placed on Outdoor Billboards

One of the most interesting (and least understood) aspects of some brands is their ability to retain their “name recognition “ after long periods of commercial inactivity. P&G’s Mr. Whipple “Squeezing the Charmin” bathroom tissue is a good example as is Lever’s Wisk brand of detergent “Ring Around the Collar” tag line. A traditional feature of U.S. outdoor industry operating practice is the thirty-day posting period. From a brand-building perspective these lengthy posting periods can be seen as repositories of long-term brand image and favorable consumer attitude accumulation; in some ways analogous to banks creating and storing financial wealth. The de facto lasting impression delivered month-after-month as a by-product of the 30 day posting periods advances the idea of permanence (distinct from continuity) in marketing communications¹⁴. This is a concept that is absent in media planning circles today—except in the negative context to lament that media dollars are not effective. Viewing brands as reservoirs of “wealth” is an interesting, rich and under exploited aspect of brand research. It is also consistent with the idea that brands are increasingly the only “link” between the consumer and the producer in an increasingly common virtual market space. As such, brands will increasingly serve as the all-important cue to initiate consumer -driven demand as brand awareness “pulls” the product through the retail channel—whatever format that channel happens to be in the future.

Outdoor Advertising “Speaks” the Brand Language of Consumers

Brands increasingly serve as a form of consumer communication short-hand in a world where time is increasingly scarce. Historically considered a weakness of the outdoor medium vis à vis other media, the constrained information message processing time is seen by some observers as working in the outdoor medium’s favor as technology elevates the importance and value of every second of a consumer’s life. As the Internet inspired paradigm for the valuation of time shifts from minutes in the 20th century to seconds in the 21st century; the relevance of the outdoor medium will increasingly become apparent. Moreover, as consumers seek an escape from a cacophony of commercially-sponsored messages; outdoor advertising — once considered mundane — may now be viewed as a consumer-friendly information-processing medium. A welcome respite from chronic information overload.

V. The Relevancy of Outdoor Advertising — The Medium is the Message

As mentioned in the introduction, the outdoor medium appears to be well positioned for the 21st century on numerous dimensions. Marshall McLuhan perhaps said it best when he penned his now famous quote, “The medium is the message”.¹⁵ Although coopted by the television industry during the 1950’s as applying only to that medium, this was never McLuhan’s intent. His interpretation was much broader and expansive; a new technology (or medium) is an extension of the human experience. The outdoor medium is unique in many respects and as noted earlier has “extended” and “transformed” consumers’ experience with selected brands. But how do the unique qualities of the outdoor medium facilitate brand building?

Brand Association

What do consumers take from a brand? How do they view or perceive the brand. These are fundamental brand management questions that changed forever after the abysmal failure of “New Coke” in 1985. The most important consumer behavior finding that

emerged from Coca Cola’s miscalculation was the brand management insight that consumers often see and use the brand in ways that even the most sophisticated marketers do not comprehend or understand fully. It is this aspect of brand communication which was discussed earlier in the context of “philosophy brands” that lends itself so well to the outdoor medium. As Graf notes, successful outdoor advertisers see billboard advertising as a “gigantic canvas” on which the brand advertiser can create “mega art” linking the brand with the relevant icon.¹⁶ The billboard context is unique — so unique that some of the most important slogans and images in advertising annals are captured with a billboard as the contextual backdrop. For example the Nike “swoosh” campaign and more recently Jordan’s dunking pose come to mind, as well as the Times Square SONY sign and also the Citgo sign in Boston. Collectively these examples provide credence to McLuhan’s often-recited assertion that the medium is indeed the message.

Stability and Consistency of Message Presentation

How is the brand presented? How often is the brand presented? Is the message noticed? The outdoor medium scores exceedingly high on these media selection criteria because of the absence of clutter and the intrinsic nature of the medium itself.¹⁷ In a media climate dominated by clutter and complexity, consistency of message and or image is critical. Recent technological advances such as electrostatic printing and computer painting provide consistency in outdoor production which has opened up new categories of advertisers for the outdoor medium. Certain brand advertisers (such as fashion and food) where visually-driven creative is the brand’s *raison d’être* must have consistent production values from market-to-market and often for extended periods of time. These brands can now use the outdoor medium with confidence that their images will not be diluted.

Clarity of Brand Focus — Even Chromosomes Count?

An effective outdoor ad underscores the emergent strength of the medium. Usually, the shorter the outdoor advertisement, the more effective the mes-

sage.¹⁸ From a media planning perspective the outdoor medium works best when consumer processing time is severely limited. But, understanding fully what the consumer sees in a brand, however, is a complex process. What makes the brand unique is also complex. Some writers have even referred to the essence of brands evolving in complexity to the point that they possess their own DNA, suggesting a complexity that rivals the human organism and the information that chromosomes carry about human life. With so many permutations possible the typical management tendency is to try to communicate every aspect of the brand into a single message or campaign. Fortunately, the intrinsic nature of the outdoor medium does not permit loose thinking because of previously noted space and layout limitations. In contrast, the outdoor imposes a creative and disciplined brand communication lexicon that in many ways ensures an ongoing revision of the brand.

Mass Advertising is NOT a Dirty Word

Outdoor is one of the few remaining media formats available to deliver a mass audience.¹⁹ Industry consolidation is also helping to facilitate efficient buys as the once fragmented industry ownership structure gives way to one-stop shopping for single market buys, regional buys or the nation as a whole.²⁰ Despite the erosion of network TV audiences, outdoor continues to grow in stature as a mass medium because of the sheer number of miles driven by consumers each year as mentioned earlier (Edmondson 1998). While it is unfashionable to think in terms of mass communication today, basic economics and bottom-line pressure on the client's media budget suggests otherwise. As noted earlier Ephron presents a compelling rationale that outdoor delivers a mass audience efficiently. Moreover, it does so at a basic level of communication. Literacy requirements are minimal; and the ever growing multilingual audiences are accommodated as well.

Lifestyle "Guaranteed" Repetition

Outdoor is able to "deliver" audiences. In a recent article in American Demographics, Edmondson presents the changes in American driving habits over the last three decades and implications for the outdoor industry. The "three decade driving boom" as he

refers to it has radically altered the time consumers have to process information and where consumers access and process information...especially commercial messages. Also, the outdoor medium is location dependent. As Geographic Information Systems (GIS) and other geo-demographic analysis packages increasingly become part of the norm of the media planning process, media such as outdoor can be more precisely targeted if needed.

VI. Summary and Conclusions

Traditional media planning axioms are being reevaluated daily in the current media environment. Outdoor has traditionally been viewed narrowly as a complementary medium by media planners. Today, this parochial view of the outdoor medium is changing based on favorable demographic trends and the realization of the way in which most consumers get their information. As business futurists were broadening the domain of "media", some academic and media researchers were reporting research results which gave non-traditional media such as outdoor, more weight in the media mix. Some examples of campaigns driven by the outdoor medium have been instrumental in: 1) launching new brands such as e-commerce brands; 2) testing new product ideas such as Apple Computer's iMac computer; 3) testing creative concepts and new brand propositions such as the Dairy Board's "Got Milk" campaign. Why the renewed interest in outdoor advertising? The earlier discussion points the way; the outdoor medium was never fully appreciated until the value of competing media alternatives were revised by consumers as their lives have been reshaped by technology, time-pressure and social trends. Together these trends are repositioning the outdoor medium as one that must be considered in the future.

Despite Leo Burnett's inspirational quote that, "Great brands live forever", it is obvious that they all age differently. Increasingly brand marketers are relying on "cultural SWAT teams" to keep track of fickle consumer interests; especially for fast changing consumer product categories. But having found the "holy grail," the most challenging question facing brand marketers still remains, "What is the best medium to communicate this message?" The often quoted metaphor, "the information superhighway" may ultimately be a misnomer; as download times continue

to increase, the information superhighway often looks more like a parking lot. In the future an enlightened perspective of media planning will include a calculation that captures the total time to induce a favorable consumer response. The new media math paradigm of the 21st century will not only consider the time (media cost) to present the message, but more importantly the time required for consumers to process (notice, comprehend and act upon) the message. This industry white paper has introduced new thinking on how to build brands using the medium of outdoor advertising while concurrently redefining the perception of the communication value of the outdoor medium among key stakeholders and audiences in two unique ways:

1. "Rethinking the medium?" Encouraging all brand marketers and advertising agencies to revisit the value of the outdoor medium as the medium of choice for a broadened scope of brand communications tasks and explore the effectiveness of the outdoor medium for a range of emerging brand management objectives.
2. "Perception vs. reality?" Inviting media buyers and planners to step "outside the media box" to appreciate that the outdoor medium, should not be viewed a highly effective mass awareness generating medium, but that it can also provide a "sales inducing message" in the time context of seconds (vs. minutes). This trend is consistent with consumers emerging information processing patterns favoring immediacy and spontaneity.

Footnotes

- 1 Edmondson, Brad, "In the Driver's Seat", American Demographics, March 1998, pp. 46-52.
- 2 Reichel, Walter and Leslie Wood, "Recency in Media Planning" Journal of Advertising Research, July/August 1997 pp.66-74.
- 3 Aaker, David A. and Donald Bruzzone, "Causes of Irritation in Advertising", Journal of Advertising, Vol. Spring 1985, 47-57.
- 4 Transformational advertising is advertising that is defined as advertising which transforms the user as part of the overall product-use experience. Well's et al, Advertising Principles and Practices 4th edition, Prentice Hall 1998, p.261.
- 5 "Advertising as Language Code" is essentially communicating with customers through firm-specific visuals, icons, words, colors etc. See Judie Lannon, "Asking the Right Questions: What do People Do with Advertising?" in Brand Equity & Advertising: Advertising's Role in Building Strong Brands, Aaker David A. and Alexander L. Biehl, Lawrence Elrbaum Associates, Hillsdale, NJ 1993, pp.163-176.
- 6 Gilmore, Fiona, editor, *Brand Warriors*, Harper Collins Business, 1999 p. 1.
- 7 Schultz, Donald and Beth Barnes, *Strategic Advertising Campaigns*, NTC Publishing Group, Chicago 1995, pp. 6-8.
- 8 Farrell, Greg, "Company transforms your cursor into a tiny ad", *USA Today*, March 2, 1999 p. B1.
- 9 The term "element" is the word used by Keller to denote the key dimensions of a brand. See Keller, Kevin Lane, *Strategic Brand Management: Building Measuring, and Managing Brand Equity*, Prentice Hall, 1998, p.2.
- 10 Thomkins, Richard, "Fading Stars of the Global Stage", *Financial Times* March 30, 1999, p.30.
- 11 Elliott, Stuart, "Apple Endorses Some Achievers Who 'Think Different'", *New York Times*, August 3, 1998, pp 1&7.
- 12 OAAA Case Study, "Package Goods" (not dated)
- 13 Ephron, Erwin, "Requiem for a Heavyweight" *Advertising Age*, August 2, 1999 p.25.
- 14 "Continuity" is a related media term, but falls short of the intended meaning here. Continuity in the broadcast or print media context, however long the campaign, is short-lived when compared to billboard advertising. Permanence in billboards is the proposition that some consumers continue to "look" for a billboard message, even after it has been removed after a normal posting period. The unique combination of the message, the medium, and the location converge to generate a permanent impression in the consumer's mind. The resulting outcome (interaction effect) among these media variables rarely occurs in other media.
- 15 McLuhan, Marshall, *Understanding Media: The Extensions of Man*, McGraw-Hill Book Publishers, 1964.
- 16 Graf, Herbert, "Outdoor as the Segue Between Mass & Class," *Brandweek*, July 20, 1999, p. 19.
- 17 Billboards in the U.S. are subject to strict zoning legislation. In the future the outdoor medium may become the least cluttered of all media environments.
- 18 A review of most OBIE Award winning campaigns reveals that the industry axiom of "seven- words-or-less" still applies today.
- 19 Haskey, Mary Jo, "The Last Mass Medium," *Mediaweek*, December 6, 1993, p. 17.
- 20 Tan, Kevin, "Infinity to Buy Outdoor Systems," *The Wall Street Journal*, May 28, 1999, p.8.