NUST INSTITUTE OF MANAGEMENT SCIENCES

MBA Thesis

"Taking the Media Wars Outside: A look at Intense Outdoor Advertising in Pakistan Telecom Industry"

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EXECUTIVE SUMMARY

Wherever we go and whatever we do, we are constantly bombarded with advertisements. In the past few years' outdoor advertising has gained momentum in Pakistan's advertising scene, attracting interest not only from local advertisers but large multi-national companies. Advertisers are increasingly recognizing the 'power' of this medium to reach a highly mobile society that happens to be spending less and less time indoors. It is a truly unique and effective medium. Consider the number of times one is exposed to outdoor advertising each day; be it commuting to work, driving to the shops or meeting friends for dinner. It is unavoidable and cannot be switched off. Therefore it impacts 24 hours a day, 7 days a week. Outdoor advertising gives companies the flexibility to interchange their creative among different site locations at their convenience to compliment their current media campaign. Basically this medium enables organizations to reach their target market with multiple visuals and establish brand and/or product awareness. In an age of ever-increasing specialization, with media focusing on smaller and smaller slices of the population, outdoor advertising, particularly billboards, remains the champion of the generic and the all-inclusive. Many think only of billboards when thinking of outdoor advertising. However, the category contains far more than just billboards. Other types of out-of-home advertising include signage on transit and bus shelters, bus exterior ads, street furniture such as public benches and more. The humble billboard itself has undergone a metamorphosis in the last several years. Advancements in billboard technology include vinyl and computerized painting as well as backlighting. These advancements boost billboards' ability to capture viewers' attention. Of course, outdoor advertising has its drawbacks. Many consumers feel that billboards are hazardous but at the same time they feel the signs are entertaining. The focus of the thesis was to analyze the outdoor industry in Pakistan and the intense advertising being done by cellular companies on this particular medium. The fact that outdoor industry is not structured but it helps increase awareness and complements other mass mediums is indeed true. The results of the survey and analysis supported all three hypotheses. The industry is unstructured as consumers feel there is no standard regulatory body overlooking the positioning and quality of billboard structures. Cellular companies like other national and multi-nationals firms are advertising on billboards as well as on television and in newspapers. They have rented billboards of various sizes and are displaying their latest advertising campaigns in clear, legible format around major thoroughfares of a city. Mobilink, Ufone, Telenor and Warid are the most common advertisers in the cellular market. Paktel and Instaphone are not advertising on this particular medium like the other four competitors. When asked respondents about various outdoor cellular campaigns many referred to Telenor Talkshawk being the best but Mobilink's Indigo and Jazz Ladies First connection are also stored in consumers evoked set. Traffic jams are a typical site in most metropolitan cities; therefore most advertisers display their billboards at major traffic signals/squares/chowks. These locations have been deemed prime sites because many cars stop at a traffic signal for at least one minute and the passengers and drivers cannot miss huge billboards of 30x90 feet, with luscious colors and attractive visuals. The effectiveness of this medium is a proof of the budding growth in outdoor advertising adspend which is around 14 percent. Outdoor was not even considered in advertising spend calculations until recently when the industry starting growing at a rapid pace. The outdoor industry has a lot to offer to the advertisers and of course the billboard site owners. Outdoor advertising has come a long way from its humble beginnings as a roadside poster. It is pure and unfettered, a proud beacon, beautifully rendering a product's benefits and whereabouts to a large market.

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1.1 Today's Market Scenario:

The amount of competition faced by organizations today is more intensive than it was ever before. With the ever-expanding number of organizations and products, customers have a wide array of choices available. As a consequence manufacturers and service providers have to compete with other organizations to sell their products to the masses. But how can it be done in this ever changing marketplace. Well the answer is through advertising.

"Think of the world as a market place where everyone is trying to sell a product, a service or an idea." (Syed M. Aslam, 2000)

Indeed it is true, the purpose of every organization is to market a product in such a way that consumers buy it right there and then. Gone are the days when products were made solely for the purpose organization thought was best suited to the public. But now manufacturers and service providers have to view their products and services from the customers' point of view not only to maintain a high quality but also to incorporate the customer-defined improvements whenever needed. The power now lies in the hands of the buyers; they are the ones who determine the success or failure of a firm. In order to remain in business for long term and ensure their survival organizations have to incorporate techniques that would force the customer to choose their product from the rest and the best way to do this; is to advertise.

Advertising has been with us for ages. Some even call it the second oldest profession. But all in all the purpose is to make people buy goods or services. With the dawn of the communications era; the advent of personal computer, Internet, e-commerce, desk-top publishing and computer-assisted designing has changed the way advertising is done today. The art of advertising has turned into a precise science. Since information travels at the speed of lighting and has crossed all geographical barriers, today's advertising can either make or break an organization's ultimate goal which is to ensure maximum revenue and that can only be achieved through targeted increase in sales. (Syed M. Aslam, 2000)

Today no facet of our life remains untouched by advertising. An array of advertisements in the print media 'demand' us to buy a certain product while television viewers have to put up with lengthy commercial breaks depending on how popular a programme is. This has led to increase in clutter which many advertisers want to avoid but because of short attention span of many advertising mediums, advertisers are looking for more and more ways to convey their message to the massive audience. (Syed M. Aslam, 2000)

The advertising industry of Pakistan has come a long way. The deeper penetration of the local market by the multinationals, the influence of the western style of consumerism, an

increased purchasing power driven mainly by the return of expatriates, the spread of manufacturers and industries beyond their regional boundaries, the maturing of television, radio and newspaper as the most effective media with the ability to reach people in otherwise far-flung areas were some of the primary factors giving great push to the advertising industry. (Syed M. Aslam, 2000)

Today Pakistani advertising industry comprises over 200 agencies of all shapes and sizes. However, the term advertising industry is used for some six dozen members of Pakistan Advertising Association (PAA) which include the major media and research based agencies. Of course it is advertisers who are the source of all advertising revenues for the agencies and the media and are the inbuilt part of all publicity activities. (Syed M. Aslam, 2000)

The current advertising forecast is bright as several industry analysts claim that advertising spend in Pakistan is set to increase as much as 40 percent in the coming years. The reason being, previously, advertising like small shop signs, boards and billboards, were not taken into account when estimating total adspend. All this makes for a sizeable unorganized advertising sector, which was never included in spend figures. Pakistani advertising is in the midst of an unprecedented boom, due to a growing economy and a couple of rapidly evolving sectors. According to Aurora magazine, outdoor advertising spend is believed to be around 14 percent, with TV and Print advertising leading around 40 and 37 percent, respectively. (Osman Samiuddin, 2005)

Figure 1: Total Advertising Spend
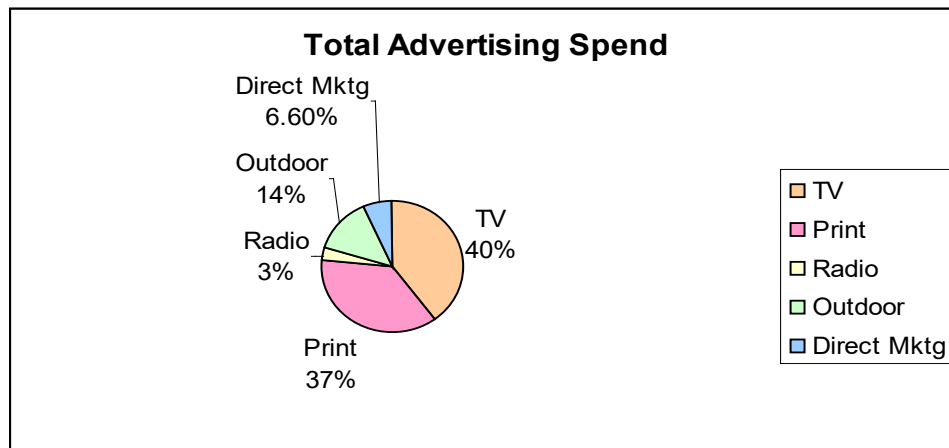
Total adspend has increased from Rs. 8.1 billion in 2002-3 to Rs. 9.8 billion. It has increased by nearly 21 percent. Growth over the previous two years has been roughly 11.5 percent. The fastest growing medium for spend was outdoor advertising. In 2002-3, total adspend on outdoor was Rs. 0.48 billion whereas this year it has gone up to Rs. 1.4 billion. That is an increase of roughly 192 percent. Adspend on print and TV has grown by 12.5 percent and 5.4 percent respectively since 2002-3. Adspend on radio has also increased, by nearly 50 percent from 2002-3, signifying the increase in the number of radio stations over the last year.
Source: Aurora Magazine, Vol 8. No. 1, January-February 2005, pg 76

Banks, mobile operators and many television channels have started to advertise because of which advertising spend has increased in the industry. The gradual shift towards consumer banking has made banks realize the need to brand themselves and give themselves an image. The growth in the telecommunications sector has had a more immediate and explosive impact. Since December 2003, the number of mobile phone subscribers in Pakistan has doubled to nearly seven million, or approximately four to five percent of the entire population. The year 2005, saw the telecom industry take over the media. Mobilink's re-launch of its post-paid service Indigo, Paktel going GSM and the Ufone re-launch were all heavily advertised in the print, electronic and outdoor media. (Osman Samiuddin, 2005)

People argue that provided macroeconomic indicators remain positive, there is no limit on the number of industries that will increase adspend. The effect of the WTO agreements could change the advertising scene as more companies will enter the industry and advertise. FMCG's continue to advertise on similar levels, TV channels are becoming big spenders along with banking and telecom companies. Most media planners agree that spending has been spread across the board. Merchant forecasts that spend on print and TV will continue to grow at the levels it has been doing for some time. (Osman Samiuddin, 2005)

Pakistani advertising is on the road to growth. There may be arguments about the size and the fact that only a couple of sectors are pushing forward and increasing adspend but there is no arguing that there has been remarkable growth in the past few years. The years to come promise even higher rate than before. (Osman Samiuddin, 2005)

1.2 Outdoor Advertising in Pakistan:

In the past few years' outdoor advertising has gained impetus in Pakistan's advertising scene, attracting interest not only from local advertisers but large multi-national companies. Advertisers are increasingly recognizing the 'power' of this medium to reach a highly mobile society that happens to be spending less and less time indoors. It is a truly unique and effective medium.

Outdoor advertising has seen the most growth; although the figure for outdoor spend is not nearly as high as the Rs. 5 billion figure one industry source estimated, it has gone over the billion mark, and it has shown a marked increase over the last year. The current outdoor adspend is around 14 percent which has increased manifold compared to previous years. (Osman Samiuddin, 2005)

Outdoor advertising is becoming increasingly one of the most powerful mediums for advertisers to communicate with their audiences. The streets of every major metropolitan city be it Karachi, Lahore, Islamabad or Rawalpindi are crowded with hoardings, carrying messages that are paving the way for the purchasing of various commodities. Consider the number of times one is exposed to outdoor advertising each day; be it commuting to work, driving to the shops or meeting friends for dinner. It is unavoidable and cannot be switched off. Therefore it impacts 24 hours a day, 7 days a week. Outdoor advertising gives companies the flexibility to interchange their creative among different

site locations at their convenience to compliment their current media campaign. Basically this medium enables organizations to reach their target market with multiple visuals and establish brand and/or product awareness.

The new technology has given billboards an all new look. Before 2000, painted hoardings seldom exceeded 20x10 feet in size, but the new skin-pasting technique has been responsible for giant steel structures up to 30x90 feet being installed on the city's roads. In Lahore, "After skin pasting was introduced in 2000, 550 huge signboards were installed in the city by 2003. By the end of 2005, the number had increased to about 1,200. The estimate does not include about 500 boards in the Cantt Board and Defence Housing Authority (DHA) precincts." (Noshad Ali, 2006)

Billboards, hoardings and neon signs are very much a part of today's marketing in our consumer based society. They not only provide a lucrative source of revenue generation for the city government but can look very attractive too; if they are placed properly. From a moving car or a bike, colorful neon signs and billboards on display along roads and thoroughfares, with models smiling right at you, do look good and make for an interesting ride. According to Tania, a young industrial designer, billboards and neon signs add color to urban landscape. "Since our city lacks color, bright, glossy ads can give a festive look to a dull, boring atmosphere," she remarks. (Rubina Jabbar, 2006)

Sign Media is one of the outdoor media agency that puts up the various billboards consumers see lining the major highways. According to Sign Media, outdoor media is popular because it is: (Sign Media Website, 2006)

✓ An economical and effective media for the promotion of brands

✓ A *MUST BE SEEN* object for the viewer

✓ Unlike TV or Radio, outdoor cannot be switched off or tossed aside like a newspaper

✓ Waste circulation is eliminated by concentrating message in the targeted market areas: they are categorized as 'A-1,' 'A,' and 'B'

✓ Targets demographically and geographically for the highest effectiveness

✓ Flexible - able to purchase for small area coverage or complete market saturation

✓ Gives your company presence in your competitor's market area

✓ Creates and maintains a highly visible and bold company image

✓ Recall for 365 days a year which is visible 24 hours of the day

✓ No size limit, hoarding may go up to 50 x 150 feet

1.3 Industry Trends-Porter's Five Forces:

Figure 2: Forces Driving the Industry Competition

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                        │   Threat of New         │
                        │   Entrants              │
                        │   HIGH                  │
                        │   Any company can       │
                        │   advertise & any can   │
                        │   make billboards       │
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│ Bargaining Power of   │  │ Rivalry among Firms  │  │ Bargaining Power of   │
│ Suppliers             │─▶│ HIGH                 │◀─│ Buyers                │
│ HIGH                  │  │ Many Companies       │  │ LOW                   │
│ Many small firms that │  │ Many Suppliers       │  │ National and Multi-   │
│ make billboards       │  │                      │  │ national Companies    │
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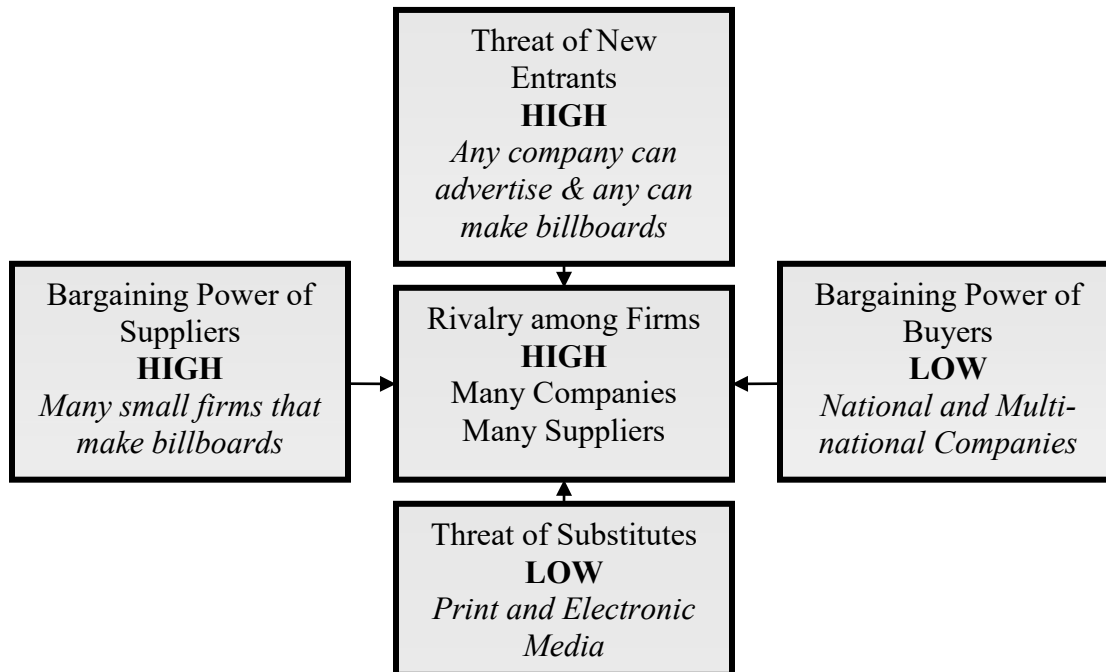
1.3.1 Bargaining Power of Buyers:

Buyers affect an industry through their ability to force down prices, bargain for higher quality or more services. (Wheelen and Hunger, 2004) Even though the outdoor market is highly competitive and intense rivalry exists between the many buyers as well as the suppliers still the ratio of demand and supply lowers the bargaining power of buyers.

1. Firstly the buyer cannot purchase large number of billboards in all prime locations. Billboards at prime sites are auctioned off, so who ever is the highest bidder gets hold of the billboard for a specified period of time. Demand for billboards is high whereas the supply is low, since prime locations are relatively less in number in most cities. The buyer of a billboard is not an individual consumer but national and multi-national companies who want to advertise their products and brands on a mass scale.

2. The buyers can not produce billboards themselves since they are already manufacturing a product or providing a service. They have to contact the outdoor agencies that have the expertise and experience of making billboards. Therefore the buyers do not have potential to integrate backwards.

1.3.2 Bargaining Power of Suppliers:

Suppliers can affect an industry through their ability to raise prices or reduce the quality of purchased good and services. (Wheelen and Hunger, 2004) In this industry the supplier power is high although there are many companies who specialize in making billboards and their structures but there are not many prime locations which can easily be allotted to a brand or product. The prime sites are auctioned and the billboard makers ask their price when they hear that a company has paid Rs. 47 lakh per annum for a billboard located at a major crossing. (See exhibit # 1 in appendix for a list of some of the outdoor ad agencies)

1.3.3 Threat of Substitutes:

Substitute products are those products that appear to be different but can satisfy the same need as another product. (Wheelen and Hunger, 2004) The threat of substitutes for this industry is low. The reason being that there are two major substitutes of outdoor advertising, they are electronic and print advertising.

Advertising on TV and in newspaper is very expensive as compared to advertising on billboards, banners and streamers. Therefore most of the local advertisers prefer to go for billboard advertising whereas national and multinationals go for TV and newspaper advertising. The switching costs are high but many companies advertise on all three mediums concurrently.

1.3.4 Rivalry Among Existing Firms:

In most industries, companies are mutually dependent. A competitive move by one firm can be expected to have noticeable effect on its competitors and thus may cause retaliation or counter efforts. (Wheelen and Hunger, 2004)

1. The buyers of billboards are companies operating in a specified industry, where they are competing with a number of similar companies. The suppliers of the outdoor industry are also competing with one another but their level of competition is not that intense as it would be if one were a mobile phone operator.

2. Billboards are unique and since they cost less every company is trying to advertise on this medium. The Cantonment Board of Rawalpindi and outdoor companies have taken advantage of the scenario and are making a lot of money at the hand of the many advertisers.

   Cantonment Board has opened up an auction for the many billboards located at prime sites, hundreds of vehicles pass these sites each day. Every company would want its billboard to be clearly visible and attract attention but not all will have the upper hand, only the one who bids the highest price will get to have its billboard placed at prime site. These aspects increase the rivalry among existing firms.

1.3.5 Threat of New Entrants:

New entrants to an industry typically bring to it new capacity, a desire to gain market share, and substantial resources. They are, therefore, threats to an established company. The threat of entry depends on the presence of entry barriers and the reaction that can be expected from existing competitors. (Wheelen and Hunger, 2004) The threat of new entrant is high for this industry for both the buyers and the suppliers.

Many new companies can easily advertise on this medium since the switching costs are low and output is good. Also the new companies with new technology in billboard making can enter the market as there are no rules or regulations set by the government. Plus the industry is not completely structured every body is doing whatever they feel is the best option. There is no proper guideline for the type, size and technology of billboard so any newcomer will be warmly welcomed by the buyers.

1.4 PEST Analysis of the Outdoor Advertising Industry:

1.4.1 Political Factors:

The outdoor advertising is not fully structured and regulated by concerned authorities. Until recently when a number of mishaps and accidents occurred due to billboards, the districts governments were forced to take action by ordering the removal of illegal billboards. Karachi, Lahore and Rawalpindi house billboards in every locality. These have hampered the surrounding environment. Of late, their numbers have gone up drastically, concealing skyline and obstructing view. Since the purpose of these advertisements is obviously to attract attention, they become distracting and, at times, quite a driving hazard, especially the jumbo-sized billboards, some of which cause visual disturbances if placed against traffic lights. Others may not be so well-secured, and may become safety hazard of another type, especially in the face of harsh winds that thrash the cities usually during monsoons, and have become quite a predictable feature of the weather. Following were some actions taken by the district government to stop companies from adding clutter to the environment. (Faryal Shahzad, 2004)

1. A ban was announced by the Punjab chief minister in 2003. Sources said that although authorities linked the ban announced in 2003 to controlling visual pollution, it was actually a response to media pressure after some boards collapsed and killed innocent citizens. They said that the ban and strict monitoring had improved the structures' quality. Signboards now require a certificate from the PHA's panel of authorized engineers and the PHA does not compromise on safety and legal requirements. ((Noshad Ali, 2006))

2. Last year, in an attempt to tackle the situation, the City District Government of Karachi (CGDK), which regulates most of the land, ordered the removal of several billboards in the area under CGDK's jurisdiction. (Mamun M. Adil, 2006)

1.4.2 Economic Factors:

Pakistan's economy continued to maintain solid pace of expansion for the fourth year in a row in the fiscal year 2005-06 despite facing headwinds from rising energy prices at $70-75 per barrel and the widespread damage caused by the earthquake of October 8, 2005. With economic growth at 6.6 percent in 2005-06, Pakistan's economy has grown at an average rate of almost 7.0 percent per annum during the last four years and over 7.5 percent in the last three years, thus enabling it to join the exclusive club of the fastest growing economies of the Asian region. (Economic Survey, 2005-06) The outdoor industry is thriving because many people are out on the streets either driving to work or going shopping. The leasing of cars has increased traffic jams as every family owns two or three cars. The buying power of the individual consumer is growing and he is able to buy luxury items. So companies are earning revenues and hence spending on advertising to attract more of that money.

1.4.3 Social/Cultural Factors:

Although billboard advertising is being appreciated, in some areas of the country not everybody appreciates billboards and the marketing purpose they serve. Violence erupted in Multan when activists of a religious party vandalized billboards featuring women. Similar incidents took place in Peshawar and Lahore. The activists felt that billboards promoted obscenity. In Peshawar, billboards are visible but there are no women on them. Recently, Telefun launched an advertising campaign, its billboards had a picture of Amitabh Bachan, many people showed their resentment against the billboard and it was immediately withdrawn. Billboards mirror the cultural and social environment of a country. Therefore they must be reflective of the values and beliefs of the society, they represent.

1.4.4 Technological Factors:

Billboards are usually made of wood. But now there are pasted on steel structures of various sizes. They are erected at locations with high traffic load. A large number of billboards are rented out to advertisers rather than giving them on ownership basis. The sizes of billboards are 48x14 or 24x12 but now larger sizes like 60x20 and 30x90 are seen all around cities. The display is painted or printed on a vinyl sheet, which is glued onto the board. Smaller billboards display a series of 30 or 24 printed posters.

In multi-message billboards, a technique called tri-faced is used. These billboards show three separate advertisements in rotation using a mechanical system. New billboards are entirely digitized using projection and similar techniques allowing animations. They can be made mobile either by mounting on a traditional billboard, onto a trawler, flatbed truck or by covering an entire vehicle in a 'wrap' image. This is sometimes used in bus advertising, though it is more common to mount smaller 'billboards; on those vehicles. '

Technology is swiftly changing the display of billboards and also the marketing techniques. In Pakistan, hi-tech billboards have still not become common. But by the way the market is booming, it would not be long before, giant sized boards are displayed everywhere.

1.5 Advertising by Cellular Companies:

The excessive competition in every sector of the industry has made companies vulnerable enough to lose their market share. Therefore many have gone to the extreme and advertise extensively to attract the consumers' attention. The telecom industry is a victim of such competition. Mobilink, Telenor, Ufone and Warid are among the many heavy electronic, print and outdoor advertisers. Cellular companies advertise concurrently on all the three mediums as they are complement of each other. If a commercial appears on television, the print advertisement will be in newspapers the next day and its billboards will be placed at major sites in each city.

There has been a significant increase in the number of national brands and companies that advertise in the print media from last year. The last year has seen a steep rise in the spending of telecom companies and banks in particular. As an example, last year Mobilink's share of the total print spend was 0.6 percent, this year it has grown to 2.48 percent. Ufone and Mobilink are among the top ten brands that advertise a lot in the print media. Since billboards complement print and TV media, any new advertising campaign in print will be displayed in the outdoor as well. Therefore if an analysis of outdoor media is done, telecom brands will have the greatest adspend. Following figures show the advertisement spend of top ten companies and product categories for the print media. This will give an idea of where the telecom sector stands in the adspend.

Figure 3: Top Ten Brand that Advertise in the Print Media
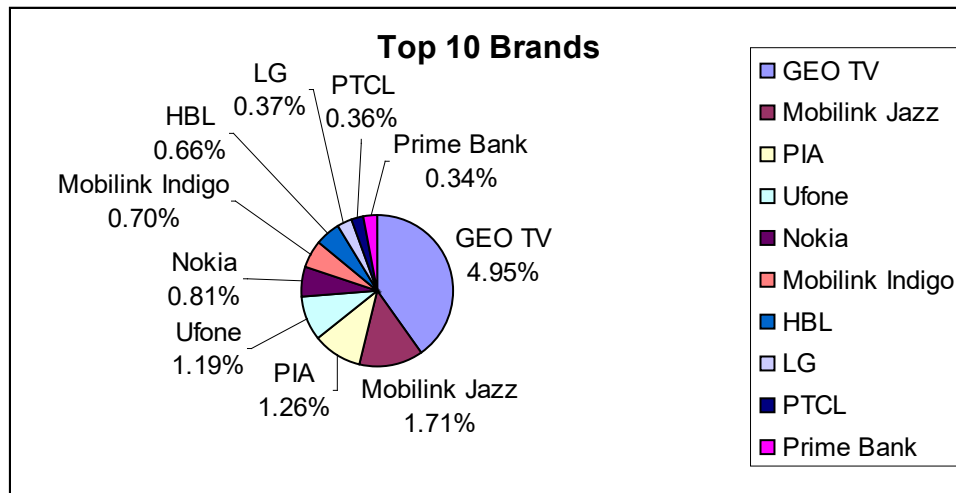
The top ten print brands list is dominated by telecom companies and bank brands; together they contribute to 5.77 percent of the total print adspend. There are eight national brands in the top ten most advertised brands in print, whereas in 2002-3, the list was evenly divided between national and multinational brands; the new national brands include GEO TV, Mobilink Jazz and Indigo and Prime Bank. This year there are four brands with over 1 percent of the total spend whereas in the last two years only one brand has spent over 1 percent of the total spend.

Source: Aurora Magazine, Vol 8. No. 1, January-February 2005, pg 60

Figure 4: Top Ten Product Categories that Advertise in the Print Media
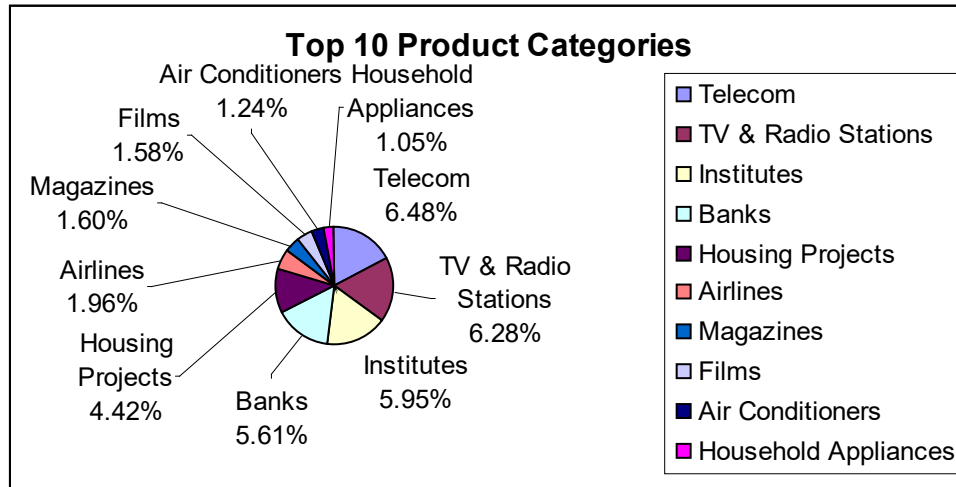
Telecom companies are the biggest spending category in print for the first time, overtaking banks and educational institutions which have traditionally been the largest spending categories in the print media. There has been a considerable increase in the advertising of TV channels and radio stations in the print media. This is the result of a significant rise in the number of TV channels and radio stations that have started broadcasting in the last year. The total adspend share of the top ten categories this year is 36.17 percent, whereas in 2002-3 it was 26 percent.

Source: Aurora Magazine, Vol 8. No. 1, January-February 2005, pg 60

Billboards of cellular companies can be found along major thoroughfares of each city. Most are positioned at prime locations at major traffic signals and chowks. In Rawalpindi alone, Telenor has put up three billboards in different sites showcasing the Telenor Talkshawk advertisement. Mobilink and Warid have also done the same only their billboards carry different messages. The intense competition has forced every cellular company to advertise on print, electronic and outdoor media.

1.6 Overview of the Cellular Industry:

After successful completion of the liberalization and deregulation process, the government has adopted prudent and transparent policies, which have ultimately created healthy competition, investment friendly environment and greater employment. As a result, the telecom users in Pakistan are enjoying the greater accessibility, better qualities and services, at very affordable tariffs. (Economic Survey, 2005-06)

In the short span of a few years, the sector has reached new heights in matters of growth and development. In fact, all performance indicators of the telecom sector have shown tremendous levels of growth. For a start, the overall teledensity in the country has reached 23.1 percent at the end of April 2006, as compared to mere 2.3 percent in 1999-2000. Similarly, foreign investment in the telecom sector has crossed US $ 1 billion during first three quarters of 2005-06. (Economic Survey, 2005-06)

The Cellular Mobile segment is the most thriving and growth oriented sector. The introduction of two new mobile companies have created great competition, resulting in the reduction of mobile tariffs, an increase in coverage and better quality of service to mobile users across Pakistan. Approximately 1.6 million subscribers are being added on cellular mobile networks each month in Pakistan. In fact, the total mobile subscribers at the end of April 2006 crossed the 29.6 million mark. Mobilink has most of the subscribers, followed by Ufone but Telenor and Warid are also catching up. (Economic Survey, 2005-06)

Table 1: Cellular Subscribers

	Mobilink	Ufone	Paktel	Instaphone	Telenor	Warid	Total	Growth Rate
Subscribers- Millions								
2000	114,272		80,221	112,000			306,493	15.39
2001	309,272	116,711	96,623	220,000			742,606	142.29
2002	800,000	350,000	218,536	330,000			1,698,536	128.73
2003	1,115,000	550,000	319,400	420,000			2,404,400	41.56
2004	3,215,989	801,160	470,021	535,738			5,022,908	108.90
2005	7,469,085	2,579,103	924,486	454,147	835,727	508,655	12,771,203	154.26
2006	17,205,555	7,487,005	1,040,503	336,696	3,573,660	4,863,138	34,506,557	170.2
July-2006	18,321,599	7,884,703	1,121,821	316,000	3,887,774	5,246,565	36,778,462	

Mobilink started operating in 1994 just four years after Paktel and Instaphone launched their service. Mobilink's coverage is spread across 1000 cities of Pakistan and this is the primary reason why Mobilink has the most number of subscribers. Ufone even though launched in 2001 has established quite a customer base. The same goes for Telenor and Warid, they came into Pakistan in 2005 and both have more than 3 million and 5 million

customers respectively. The growth rate in the subscriber base is tremendous. There are a total of 36 million+ mobile phone subscribers in Pakistan.

Source: Pakistan Telecommunication Authority, 2006

Competition in the telecom sector has changed the market share of major cellular companies on a positive note. The market share of Mobilink, the largest cellular market player has dropped from 64 percent in 2003-04 to 51 percent in April 2006. In addition, two new mobile companies Warid and Telenor have grabbed about 22 percent of the market share in short span of time and both of the companies are competing aggressively with market leaders Mobilink and Ufone. (See Figure 5)

Figure 5: Cellular Market Share (April 2006)
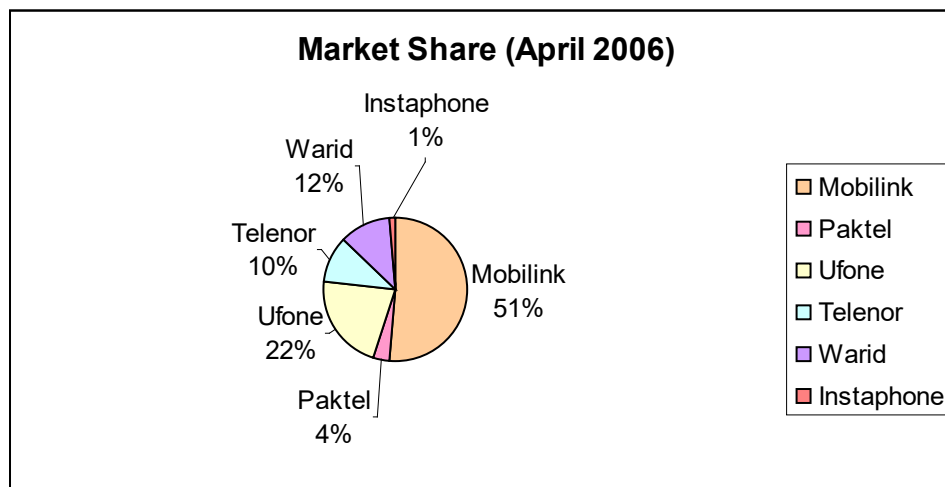
Mobilink has the highest market share of 51 percent but two new comers Warid and Telenor are taking away customers from Ufone and Mobilink. Ufone is successful because of its value added services and the fact that it has significantly lowered its call rates. Warid has pursued the same strategy and is reducing its call rates and has gone to 1 second billing. Telenor and Warid are giving a tough time to Mobilink especially since it has taken a stand and is still charging a high price for its various services.

Source: Pakistan Telecommunication Authority, 2006

1.7 Major Players of the Telecom Sector:

1.7.1 Mobilink:
Mobilink GSM, started as a joint venture of IWC, Motorola and Saif Group in 1994 with GSM digital technology. Foreign partners later sold out and now Mobilink is a subsidiary of Orascom. Mobilink has become the market leader both in terms of growth as well as

having the largest customer subscriber base in Pakistan. Mobilink is the first cellular service provider to operate on a 100 percent digital GSM technology in Pakistan that also provides state-of-the-art communication solutions to its customers. Mobilink offers exclusively designed tariff plans that cater to the communication needs of a diverse group of people, from individuals to businessmen to corporate and multinationals. To achieve this objective, they offer both postpaid (Indigo) and prepaid (JAZZ) solutions to their customers. Compared to competitors, both the postpaid (Indigo) and prepaid (JAZZ) brands are the largest brands of their kind in the Pakistan cellular industry. They offer a host of value-added-services and at the same time, Mobilink places high importance to its coverage; they are in 1000 cities and towns nationwide as well as over 100 countries on international roaming service. (Mobilink Website, 2006)

1.7.2 Ufone:

PTML, a 100 percent owned subsidiary of PTCL was established to operate cellular GSM 900 services. The company commenced its operations, under the brand name of Ufone, from Islamabad on January 29, 2001. Ufone expanded its coverage and has added new cities and highways to its coverage network. Ufone now covers over 100 key cities and prominent highways across Pakistan providing the customers best quality service and value for money. Within six years of it presence in the market, it has come a long way. It has attained the second highest market share, only behind Mobilink. It is a great achievement keeping in view that it is a relatively young player as compared to Paktel and Instaphone which have not been able to do this in years. With a total current investment of over $350 million, including a recent contract of $161 million for expansion and capacity for 2004-05, PTML believes in solid commitment to growth, security and reliability. Currently, with a market share of over 22 percent, and an aggressive commercial plan, the customer base has more than tripled from the last fiscal year to over 7 million subscribers. (Ufone Website, 2006)

1.7.3 Paktel:

Paktel received its license in 1991 and started out as the first cellular firm in Pakistan with AMPS analog technology. It was a joint venture between Cable and Wireless and Hassan Associates. Cable and Wireless later sold out due to losses in operations and network closures in Karachi. Paktel was taken over by Millicom, which also controls Instaphone. Paktel has a 4 percent market share. Paktel is the pioneer cellular phone operator in Pakistan. It started its operations in April 1990. Though Paktel was the one that brought revolution to the telecom sector in Pakistan but it failed to keep pace with the technological changes and was left behind in the race. It used to operate on AMPS or analog system. With the advent of GSM technology, Paktel failed to switch to it in time. It launched GSM services in the end of 2004. Currently its services are available in almost 300 cities of Pakistan**.** (Paktel Website, 2006)

1.7.4 Instaphone:

Instaphone introduced Pakistan to mobile telephony in 1991. Instaphone covers an ever expanding network of 200 cities and pioneering consumer-favorable initiatives such as; Pre-paid plans, Calling Party Pays, low end pre-paid cards, 12 months Free Incoming, Roam Free Incoming, Interconnect SMS services and International SMS services. It started with AMPS service later converted to digital TDMA technology. It is a subsidiary of Millicom and has a current 1 percent market share. It had a large footprint in Karachi and suffered losses due to networks shutdowns in Karachi. Pakistan. (Instaphone Website, 2006)

1.7.5 Telenor:

Telenor acquired the license for providing GSM services in Pakistan in April 2004, and has launched its services commercially in Islamabad, Rawalpindi and Karachi on March 15, 2005. The official opening was held in Islamabad with the President of Pakistan General Pervaiz Musharraf as the guest of honor and a Telenor delegation headed by CEO Telenor Jon Fredrik Baksaas. On March 23, 2005 Telenor started its services in Lahore, Faisalabad and Hyderabad. Telenor has become the second largest cellular network in Pakistan by launching over 500 destinations in just over a year but its market share is 10 percent. Telenor is proud to build mobile communication infrastructure in Pakistan and looks forward to combining its experience in mobile technology with the local Pakistani high level of competence. Telenor's primary aim is to offer top quality mobile services and promote healthy competition in the mobile market. Telenor can be called a little brother of Ufone (even though they are not related). Their sound clarity is really excellent. Their GPRS is a fast connecting one than Ufone as its EGPRS(Enhanced). The easy load facility is the excellent idea of re-charging account from 10 to 1000 RS with unlimited validity. (Telenor Website, 2006)

1.7.6 Warid:

Warid is the latest entrant in the telecom sector of Pakistan. Warid has been launched by Abu Dhabi Consortium of UAE. Warid is an Arabic word meaning an Oasis in the middle of a desert. It is pronounced as Waa-rid. The meaning of its name directly depicts aim of the company to capture a central position in Pakistan. Warid is the hub of telecommunication in Pakistan. It is backed by the Abu Dhabi Consortium of Sheikh Nahayan Mabarak Al Nahayan. The Abu Dhabi Consortium, who has other successful investments in Pakistan, namely Bank Alfalah and United Bank Limited, was interested in investing in other booming segments of the economy like Telecom. Warid Telecom cherishes their team, vision, shareholders and associated companies. As part of its

business strategy, Warid Telecom plans to establish itself as a leader, and increase the overall market size through broader coverage of all income groups due to its affordability. Warid Telecom's superior products, high quality of service, and customer support will enable it to not only capture market share from existing players, but also acquire the so far untapped market. Currently Warid's market share is 12 percent. Warid Telecom's vision is "To be the leading national communication provider with a strong international presence." (Warid Website, 2006)

Section II: Literature Review

2.1 What is advertising?

"Hundreds of years ago, advertisements were created to generate awareness. Then they improved to the point of being persuasive. Now, they are downright manipulative. The next step – and we are almost there – is where advertisements are so effective that you will be compelled to buy whatever they tell you to buy. The only choice you will be able to make is where you choose to see the advertisements." (Tiwari, Sanjay, 2003, pg 24)

In today's world, advertising is widely equated with what people see and hear as advertisements on television, print, radio, outdoor and lately, the Internet. Advertising fascinates most people. They love its gloss and sparkle, the imageries, the aspirations of a better life, the indulgence with the self, the feel good factor, the way it touches their senses and inner emotions. Yet people hate it for its power to influence, for making them want more and spend more, for making them impulsively buy things that they may later have second thoughts on, and for its intrusion in their private space and favorite pastimes. (Tiwari, 2003)

At the beginning of the twentieth century the image of advertising was quite different. The nature and scope of the business world and advertising were quite limited too. A century later, our planet is a far different place. The nature and needs of business have changed, and so have the concept and practice of advertising. There are many definitions of advertising but generally most of them are around the same lines (Arens, 2004); *Advertising is the paid, non-personal communication of information, about products, services or ideas by an identified sponsor through various media in an effort to persuade or influence behavior.* (Bovee and Thill, 1995)

Advertising is, first of all, a type of *communication*. (Arens, 2004) It communicates information about a product, service or idea to the target audience. Advertising is *non-personal* because it is directed to groups of people rather than to specific individuals. An *identified sponsor* such as a company selling a product or a nonprofit group seeking donations pays for the ad message to be placed in the mass media. (Bovee and Thill, 1995) Of course, most advertising is intended to be *persuasive.* (Arens, 2004) The information influences people to buy a particular product, vote for a specific candidate or donate money to a worthy cause. (Bovee and Thill, 1995) Advertising is defined like this in most books but the most basic, simplest and the broadest way to define it can be found in its Latin origin, *ad verter* which means 'to turn the mind towards,' or 'to draw attention to.' Simply put something that is done purposefully to attract or catch attention. (Tiwari, 2003)

Most television commercials, newspaper ads, billboards, and other advertisements are group efforts representing the work of four distinct players in the advertising process: advertisers, advertising agencies, the media and suppliers. *Advertisers* are people or organizations that seek to sell products or influence people through advertising. Advertisers generally hire *advertising agencies,* which are independent organizations that specialize in developing and implementing advertising on behalf of advertisers. The

advertising agencies in turn select the *channels* through which advertisers' messages are carried to their intended audiences. Advertisers and advertising agencies also use the services of various *suppliers* for the process of creating and executing persuasive messages. Suppliers are individuals or organizations that provide specialized services such as photography, printing and video production etc. (Bovee and Thill, 1995)

2.1.1 Types of Advertising:

Not all advertising is the same. Ads differ depending on who the message is intended for, where the ad is shown, which media are used and what the advertiser wants to accomplish. Therefore it is useful to classify advertising according to target audience, geographic area, media used and purpose. (Bovee and Thill, 1995)

Table 2: How to Classify Advertising

Target Audience	Geographic Area	Media Used	Purpose
Consumer	**International**	**Print**	**Product or non-product**
Business	**National**	Newspaper	**Commercial or noncommercial**
Industrial	**Regional**	Magazine	**Direct action or indirect action**
Trade	**Local**	**Electronic**	**Primary or selective demand**
Professional		Radio	
Agricultural		Television	
		Outdoor	
		Billboards	
		Transit	
		Street	
		Alternative	
		Direct Mail etc	

Source: Bovee and Thill, 1995, pg 5

2.1.1.1 Target Audience:

One way to classify advertising is according to the group it targets. Whether, it is in print, on television, or on billboards, every advertisement is aimed at a specific group of people, known as its target audience. Usually people are aware of ads targeted only to them since advertisers try to match the message and the media to the target audience. Ads are generally addressed to one of two broad audience categories: consumers or businesses. *Consumer advertising* is aimed at consumers, the individuals and families who buy goods and services for personal or family use. This type of advertising can be targeted to the buyer of a product or to the user. On the other hand, *business advertising,* directs messages toward people who buy or use products in businesses, not-for-profit organizations and government agencies. Within the broad category of business advertising are four distinct classifications. (Bovee and Thill, 1995)

Industrial advertising targets people who buy or use the materials and services needed to conduct business or to manufacture other products. *Trade advertising* targets intermediaries such as wholesalers and retailers that buy goods for resale

to customers. Most trade advertising is placed by producers that want their goods or services distributed by the intermediary, but some businesses advertise products to be used by the intermediaries themselves. *Professional advertising* is directed toward licensed professional practitioners such as lawyers, accountants, doctors, dentists and engineers. This category of advertising may be used to persuade professionals to buy a particular product useful in their work or to recommend that product to their patients or clients. Another category of business advertising targets the agricultural industry. *Agricultural advertising* is used to sell products such as tractors and insecticides. (Bovee and Thill, 1995)

2.1.1.2 Geographic Area:

A second way to classify advertising is by geographic area. Advertising can be confined to a single neighborhood or can include the entire world. When an organization crosses national borders to advertise in more than one country, it is placing *international advertising*. When an organization advertises in more than one region of a single country, it is using *national advertising*. Advertising in a specific region without covering the entire country is *regional advertising*. Regional advertisers generally use local newspapers, local radio or local television to reach several geographically linked markets within a region. Compared with regional advertising, the scope of *local advertising* is much narrower, concentrating on a more confined area such as a city. Much of the local advertising one sees is *retail advertising*, placed by retailers, including supermarkets and department stores that want to reach consumers. For this reason, the terms local advertising and retail advertising are sometimes used interchangeably. (Bovee and Thill, 1995)

2.1.1.3 Media:

A third way to classify advertising is according to the medium or media used. Popular forms of media advertising include newspaper, magazines, radio, television, outdoor (billboards) and transit. Television is one of the most powerful advertising media and is often the primary medium used by national advertisers, because of its ability to reach huge audiences across large geographic regions. Specialized type of television advertising have become more attractive as cable television, satellite television, interactive television and other forms of television have drawn large audiences. Many organizations also advertise through direct mail or in the yellow pages and other directories; the list of media options grows longer as newer media such as in-store radio become commonplace. (Bovee and Thill, 1995)

2.1.1.4 Purpose:

A fourth way to classify advertising is by purpose. Just as advertisers are a varied lot, so too are the reasons they use advertising. A company may advertise to build its reputation; a retailer, to attract customers; a manufacturer, to sell its brands; and a non-profit organization, to find donors. Each advertiser has its own goals, but the purpose behind each message can be classified according to four dimensions: product versus non-product, commercial versus noncommercial,

primary demand versus selective demand and direct action versus indirect action. (Bovee and Thill, 1995)

A *product* is a good or service for which customers will exchange something of value. The purpose of *product advertising* is to sell the advertiser's goods or services. Goods are physical products such as pencils and candy bars; *services* are intangible products that offer financial, legal, medical, recreational or other consumer benefits. The flip side of product advertising is *non-product advertising*, also called *institutional or corporate* advertising, in which the advertiser is trying to polish its image or influence public opinion about an issue. (Bovee and Thill, 1995)

Much of the advertising around us is *commercial advertising*, placed by a business that expects to make a profit. In contrast, non-profit and political organizations use *non-commercial advertising* to promote causes or candidates rather than profit-making products. The purpose of *primary demand advertising* is to stimulate demand for a particular product category, not for any one brand. This type of advertising is generally placed by associations that represent many manufacturers or service firms. Once primary-demand advertising has paved the way, *selective demand advertising* is used by individual producers to build demand for their own brands. (Bovee and Thill, 1995)

When advertising is geared toward getting the audience to respond immediately, it is called *direct-action advertising*. Messages that include a toll-free phone number, a coupon or a limited-time offer are forms of direct-action advertising. The advertiser can quickly see whether the ad is working by counting the responses. On the other hand, when advertising is used simply to build the audience's awareness of a product, it is *indirect-action advertising*. This type of advertising works over the long haul to boost a product's image, explain product benefits or show where the product may be purchased. (Bovee and Thill, 1995)

2.2 Functions of Advertising:

As well all know advertising is not an end but means to an end. It is a tool that advertisers can use to reach their goals. The functions of advertising vary depending on the advertiser and its particular objectives, which usually include one or more of the following: (Bovee and Thill, 1995)

2.2.1 Differentiate:

Companies use advertising to distinguish their product or service from that of competitors. Since there are many companies offering the same type of product, therefore they have to position themselves as such that customers prefer their product over competitors. This is the primary function of advertising and also the important reason behind the company's motives to increase its profit. (Bovee and Thill, 1995)

2.2.2 Communicate:
Advertising is an ideal tool, to use, to inform customers about the company's reason for existence. When companies advertise their products, they focus on the ways consumers can use the products, the quality they can expect and the convenience the product can provide. (Bovee and Thill, 1995)

2.2.3 Increase Product Use:
If the company is introducing a new product in the market and it is encouraging customers to try the product, it can advertise, by informing customers of discounts, premiums or rebate to initiate trial purchase. Advertising gives customer the push, to buy the product and use it for the first time and if the product lives up to its promises than the advertising would be considered effective. (Bovee and Thill, 1995)

2.2.4 Expand Distribution:
Sometimes a new product is advertised but it is not available at the local store. But people have seen the ad and they want to try the product so they request the manager to stock the product, this increase the product's demand. Therefore the more customers are stimulated by advertising; they will request the product and the more stores will have to carry it. (Bovee and Thill, 1995)

2.2.5 Brand Loyalty:
Advertising is an ideal way to increase brand loyalty. Companies have a lot of competition, so they use advertising to give customers a reason to prefer their product over other brands and to stay with their brand within the product category the new time customer buys the same product. (Bovee and Thill, 1995)

2.2.6 Reduces Costs:
If a company had to go to each customer and sell its product door to door, it would have cost a lot time and money. The costs would have been astronomical. But advertising to the masses using various media is more effective and less time consuming and in the end would cost less. (Bovee and Thill, 1995)

Non-profit and government organizations use advertising for many of the same reasons. Although such organizations are not seeking profits, but they can use advertising to build an identity in the public's mind, to communicate information and to do all other things that advertising does so well. (Bovee and Thill, 1995)

2.3 Advertising and Marketing:
Advertising is a key element in the process of marketing. Marketing is the conception, pricing, promotion and distribution of ideas, goods and services that satisfy the needs of individuals and organizations. Advertising plays an important but relatively limited role in marketing. It can be used to promote a product's many advantages, but it does not determine which features will satisfy people's needs, where products should be distributed, or what price should be charged. Basically, the marketing process provides the framework in which advertising is created. (Bovee and Thill, 1995)

2.3.1 The Marketing Planning Process:

The starting point of any marketing planning process is to do an extensive marketing situation analysis, the first thing being to understand the 'consumers.' Keeping the consumer's in mind, companies also must look at the competition and of course simultaneously, they also must study themselves. (Tiwari, 2003)

Figure 6: The Marketing Planning Process

Market Situation Analysis
Customer-Company-Competition

SWOT

Marketing Problem

Marketing Objectives and Strategy
Market Share-Target Segments-Positioning

Marketing Mix
Product-Price-Promotion-Place

Advertising Objective and Strategy
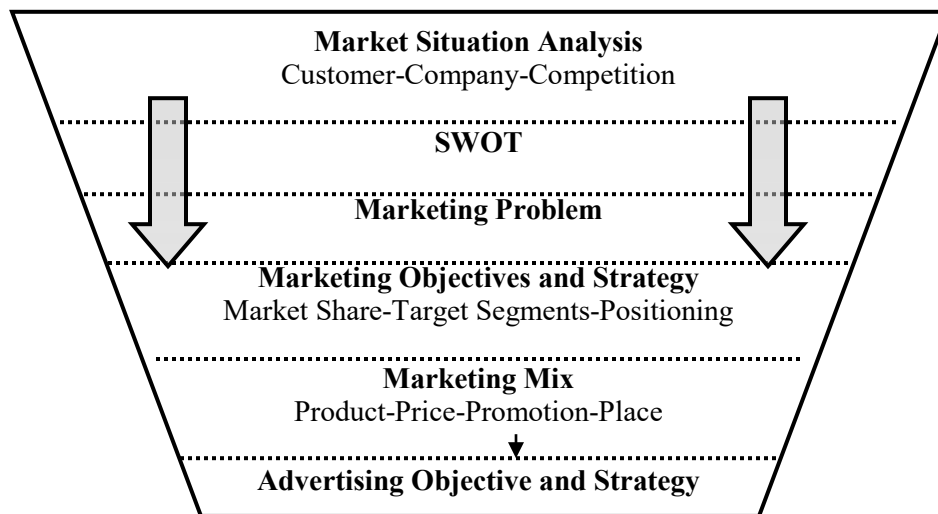
Source: Tiwari, 2003, pg 37

The net result of the market situation analysis is that it helps companies figure out what are the 'opportunities' available in the market and what 'threats' companies need to guard against. SWOT, is the next step of the plan that helps in identifying the marketing problem at hand. Once the problem is clearly defined, marketing objectives and strategy are developed with a focus on identifying target market and positioning statements. All these are done to identify the solution to the problem. Once the marketing strategy has been finalized by defining the target segments and brand positioning, companies then go on to define how and in what form they will deliver the distinct brand position to the target audience. Thus they end up outlining the marketing mix. (Tiwari, 2003)

The last part of the marketing plan is the marketing mix that is product, price, promotion and place. **Advertising** is one of the ways of carrying out the promotion part of the marketing mix. (Wilmshurst, 1994) The marketing planning process is essential because it sets the tone of the advertising plan. According to J. Thomas Russell and W. Ronald Lane, "to understand advertising, one must have a perspective of the overall marketing and marketing problems of the firm. The advertising plan will flow directly from the marketing plan. Only after a marketing plan has been developed can we move ahead to begin our advertising program." (Russell and Lane, 1996)

The whole marketing process can best be defined as the profitable application of a company's resources to satisfying the needs of its customers. To satisfy the needs of its customers, a company must not only supply good products but also ensure that they are

suitably priced, readily available and well presented. All of these aspects have to be acceptable to customers but also in some way perceived by customers as being 'better' than anything offered by competitors. There has to be a competitive differential advantage. This approach is often referred to as the marketing concept and the whole process can be briefly expressed in the following figure: (Wilmshurst, 1994)

Figure 7: The Marketing Concept

```
1. The Marketing Concept, means that companies must produce what people want to buy,
                   NOT sell what they like to make, therefore they have to…
                                        ↓
2. Put the customer first, but companies must organize and co-ordinate in order to…
                                        ↓
3. Find out what customers need, by carrying out market research in order to…
                                        ↓
4. Supply satisfaction for those needs, by offering customers the right marketing mix
                                        ↓
5. Marketing Mix, includes
                   = Product- the right article

                   = Price - at the right price

                   = Place -available through the right channels

                   =Promotion-presented in the right way
```

Source: Wilmshurst, 1994, pg 20

2.4 Advertising and Communication:
First and foremost, advertising is a special kind of communication, where the advertiser has a message to communicate to the target audience. Whether the message involves words or pictures, education or persuasion, it is important for the advertiser to understand the communication process. (Bovee and Thill, 1995) Even William F. Arens, agrees that in order to succeed, advertisers must understand the elements of the advertising communication process, which is derived from the basic human communication process. (Arens, 2004)

2.4.1 The Human Communication Process:
Survival of people depends upon their ability to interact with one another. As a person grows up, he or she learns to listen and respond to others' messages. The traditional model of communication as shown in (Figure 8) basically summarizes the series of events that take place when people share ideas in informal oral communication. The process begins when one party, called the source, formulates an idea, encodes it as a message, and sends it via some channel to another party, called the receiver. The receiver decodes the message in order to understand it. Once the message is acknowledged, the receiver responds back to the original message, called feedback, which in turn affects the

encoding of the a new message. Of course, all this takes place in an environment characterized by noise. (Arens, 2004)

Figure 8: The Human Communication Process
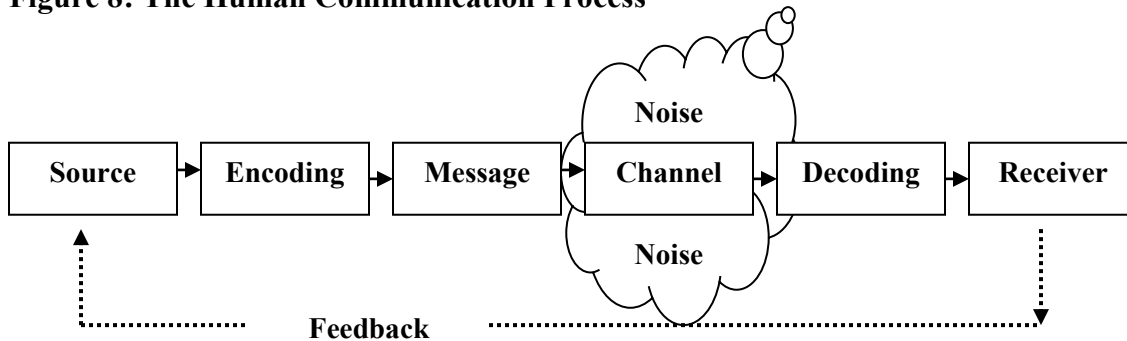
Source: Arens, 2004, pg 9

When the traditional model is applied to advertising; the source, message, channel, receiver and feedback take on different terminologies and names. The advertising communication model takes into account the additional aspects for example the structure or the creativity inherent in composing the advertising message. The advertising communication process will be explained in more detail in the following paragraphs. (Arens, 2004)

2.4.2 The Communication Process in Advertising:
The process of getting an idea from one person to another is extremely complex. To simplify this situation, think of communication process in advertising as a circular route between the source and the receiver (See Figure 9). The advertiser that generates the idea is the source. The idea that is communicated is the message, and the source encodes that message, translating it into symbols such as words or images that can be understood by the receiver that is the audience. The medium carries the encoded message to the target audience. The medium could either be print, electronic, outdoor or the Internet through which the message is displayed. The audience plays a vital role in the communication process, because when people receive the message, they must interpret the meaning, a process called decoding. (Bovee and Thill, 1995)

All this sounds really easy but it is not, the advertiser has to identify and analyze the audience so that the he can send the appropriate message through the right medium. This is done by the advertiser to ensure that once the audience receives the message they respond back in the same way as expected. The feedback basically lets the source know that the message was effective and interpreted in the right way and was not interfered with in any way. All too often, there is the issue of noise or clutter that can distort the message. Since advertisers are sending out messages through mediums that are carrying messages of other advertisers as well, audience is likely to be derailed by the clutter that is contributing in terms of noise to the overall communication process. Therefore it is important to consider, how the message will move through every step of the communication process. (Bovee and Thill, 1995)

Figure 9: The Communication Process in Advertising
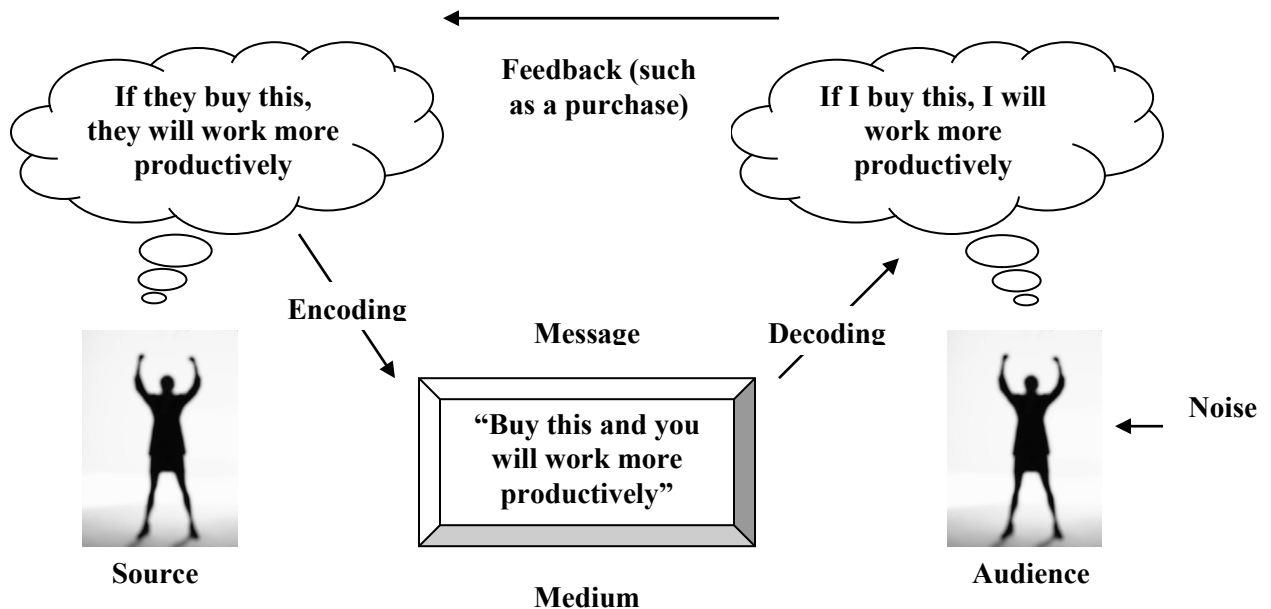
Source: Bovee and Thill, 1995, pg 14

2.4.3 Communication Phases in Advertising:

In advertising, communication has a specific purpose, which is to send a message that will inform and persuade customers to take some action. The process of sending these messages to target audience is called marketing communication. When marketing communication is deemed successful, customers move from a continuum of awareness to satisfaction in six phases. Following is a list of the six phases: (Bovee and Thill, 1995)

2.4.3.1 Phase 1; Awareness:

This phase is particularly important when companies introduce new products or when they start selling it in the market. Advertisers need to make sure that the target audience is well aware of the products. Awareness is the first step in any communication process since customers will not be able to demand for the product from the nearby retail outlet. Once they see the advertisement, they may be able to request the manager to stock the product, hence increasing the demand. (Bovee and Thill, 1995)

2.4.3.2 Phase 2; Comprehension:

It is important to inform the customers about the features and benefits of the product. Sometimes this phase is really difficult to carry out, especially when a company is selling a complex product or even a service. Advertisers have to make customers feel the product as real, since in services the output is intangible. Therefore a lot of focus on images and demonstrations would help tell customer the features and benefits. (Bovee and Thill, 1995)

2.4.3.3 Phase 3; Acceptance:

Once the message is sent, it is up to the customers to decide whether the product meets their needs or not. Although, the product may be rejected for a variety of reasons but the advertising message can help them realize that the product can meet their needs. Here advertisements play the supplementary role, to help get the product accepted by the mass audience. (Bovee and Thill, 1995)

2.4.3.4 Phase 4; Preference:

After acceptance phase, comes preference. Buyers choose a favorite among the products they believe meet their needs. However, just because people prefer the product does not mean they will buy it. Advertising must offer a compelling reason for people to buy the product. It has to increase the preference level of the customers so that they buy the company's brand than the competitor's brand. (Bovee and Thill, 1995)

2.4.3.5 Phase 5; Ownership:

Once companies show customers that they should buy their product, they are expecting customers to take action. This phase encourages 'call to action,' which motivates people to actually buy the product. The action will move customers from the preference to the ownership phase. Of course, ownership is the feedback advertisers hope to receive when they communicate with an audience. (Bovee and Thill, 1995)

2.4.3.6 Phase 6; Reinforcement:

This phase starts a new cycle in the communication process because it is encouraging customers take action again. Now the company is sending another message to the audience, expecting feedback in the form of another purchase. This phase also makes sure that the customer is satisfied with the previous purchase and hence advertisements in this stage tend to reinforce the previous sent messages. (Bovee and Thill, 1995)

This continuum is sometimes also called the **hierarchy of effects model** because it reflects the customers' stages of reaction to advertising. Members of the target audience progress through the six phases at their own pace. Some customers may be at phase one while others at phase three. It is up to the advertisers to understand where their target audience stands and find ways to encourage them to move from one phase to the next. If an advertiser finds that many people accept and prefer the product but few people buy it, they can look for clues to miscommunication or noise that interferes with the message. The advertisers can work towards a solution to more effectively encourage people to move into the ownership phase. (Bovee and Thill, 1995)

2.5 Role of Advertising:

Advertising is the most critical link between the advertiser and the consumer in today's world. Often it is through advertising that the marketer communicates to and reaches the consumer even before the product is in the market. Advertising's ability to transform products into brands in consumer's minds is vital for creating and sustaining a

relationship with them. Advertising makes promise to the consumer whereas marketing delivers them to the consumer and of course positioning portrayed in advertising is derived from marketing. The role of advertising is clearly depicted in the following figure: (Tiwari, 2003)

Figure 10: Role of Advertising
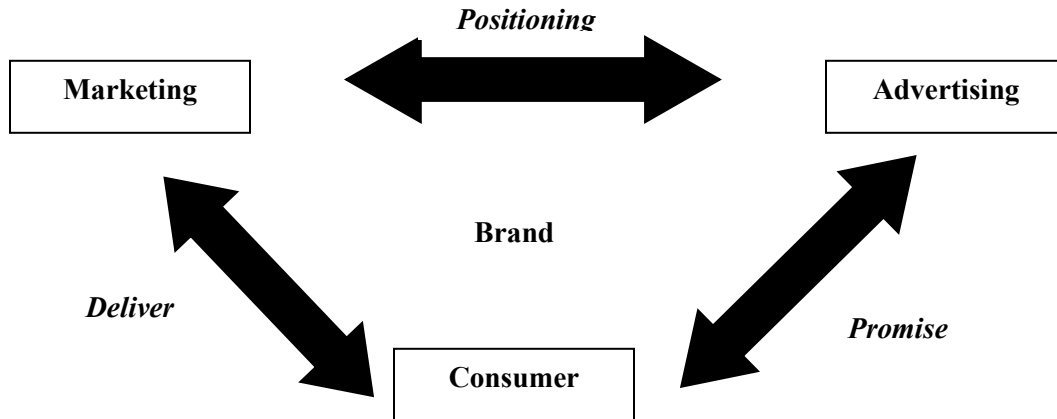
Source: Tiwari, 2003, pg 85

Good, effective advertising is therefore almost a necessary condition for any marketing effort to succeed in today's competitive world. If advertising is used properly, if has the capability to cut competition to pieces, if not than it would have a negative effect on the company. As advertising is a part of promotion in the marketing mix, a good understanding of the marketing and branding principles is a must. The entire advertising plan and development process will have a lucid direction, once it is clear as to what advertising is supposed to achieve, and within what marketing and brand parameters. Therefore, any advertising objective should be in line with the marketing objective and strategy and the advertising framework shows exactly that. (Tiwari, 2003)

As already stated the advertising strategy flows out of the marketing strategy. (See Figure 11) The well-defined target groups automatically translate into a well-defined target audience that identifies with the style of the advertisement. The same flow goes for positioning, which helps in developing the message and also the idea, around which the advertisement would be created.(Tiwari, 2003) The advertising framework gives an overview of what role advertising performs in developing a marketing communications campaign. The first phase is marketing, if that is not clear, than the second phase of advertising would not be clear and of course the outcome that is the advertisements, which are developed in conjunction with the creative and media mix, will be off target. Eventually, the whole communications campaign will backfire and not achieve the desired response that advertising was supposed to achieve. As Sanjay Tiwari puts it, "if there is no clarity on the purpose to shoot, or no marked target, or no precision in aiming, or no synchronization in when to pull the trigger, the bullets will fly all over the place resulting in a lot of unintended, innocent and at times self casualties." (Tiwari, 2003)

Figure 11: The Advertising Framework
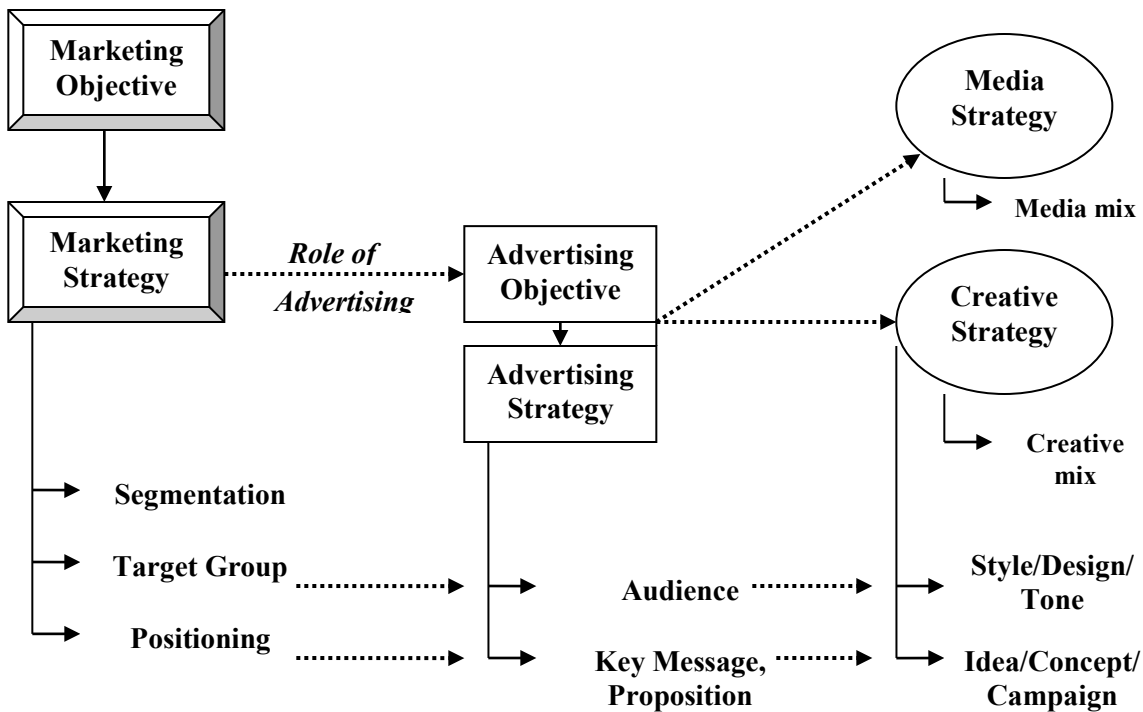
Source: Tiwari, 2003, pg 86

2.6 Advertising Goals:

The role and effectiveness of advertising is more in the realm of bringing out the needs and wants of consumers to make them desire the brand. Advertising's strength lies more in persuading and motivating consumers to want the product, in establishing identification between the consumer and the brand and finally creating a preference for it. This is what advertising does best. The goals set in advertising must be the ones that can be achieved and measured. According to Sanjay Tiwari, interim advertising goals should be developed, that lie within the realm of advertising's ability to influence and motivate consumer choice. The interim goals should lead to '*brand preference*,' which generally means trying to persuade and convince the consumer that only the said brand can offer the benefits, identification and experience to satisfy their relevant needs and wants. (Tiwari, 2003)

The advertising goals vary from creating brand awareness to reinforcing brand relationships and what goal to pursue depends on the product's life cycle and brand's position in the market. In the early stages of the life cycle the focus is on creating brand awareness, by disseminating information about the product. Once the brand enters competitive stage, new set of goals emerge like brand comprehension and image, therefore advertising's focus would be on persuading customers to buy the company's brand than the competitor's brand. Finally the maturity stage brings new goals and focus on reinforcement. The ultimate goal of advertising is to create brand preference, which is what advertising is best suited to deliver. (Tiwari, 2003)

Figure 12: Advertising Goals

Early Stage	**Brand Awareness**		*Interim Goals*				*Long-term Goals*
	Brand Familiarity	→	**Information**			**Trial Purchase**	
Competitive Stage	**Brand Comprehension**	→	**Persuasion**	→	**Brand Preference**	↑	→ **Sales**
	Brand Image					↓	
	Brand Personality	→	**Reinforcement**			**Repeat Purchase**	
Mature Stage	**Brand Relationship**						
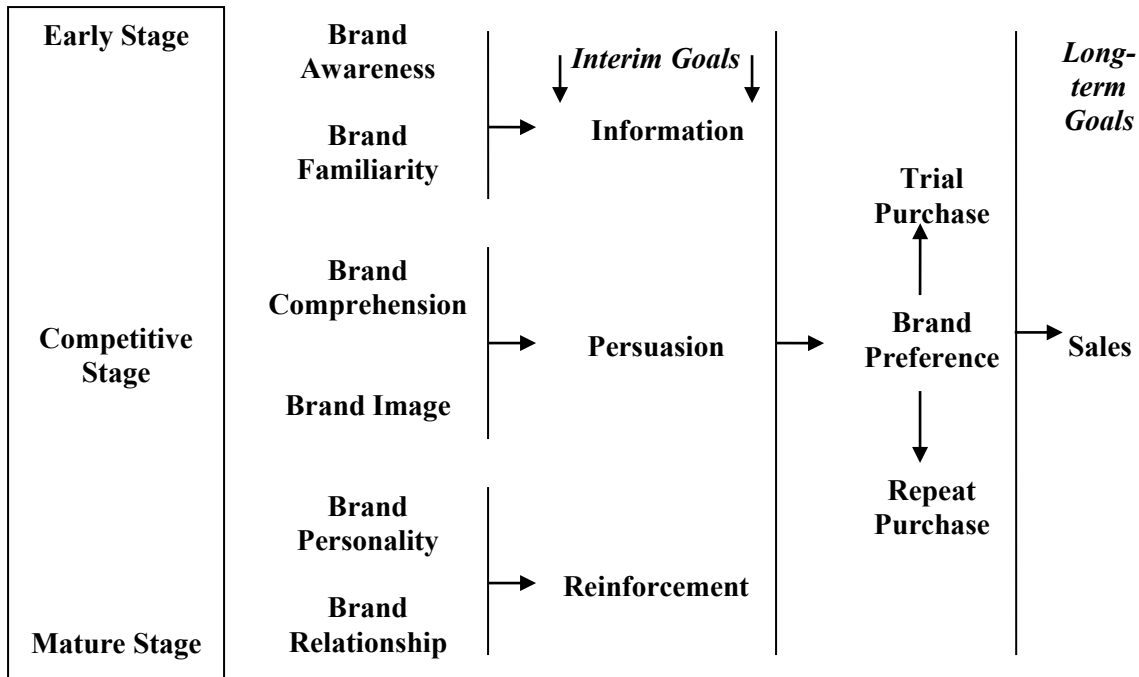
Source: Tiwari, 2003, pg 92

2.7 Measuring Advertising Effectiveness:

Advertising, like every other tool, needs to have systems in place that will measure its output and determine its efficiency and effectiveness. Advertising communication process wants customers to take 'call to action,' which is to make a purchase. But a brand needs to be heard more, so that it finds a place in the evoked set, in the mind of consumers when they are at the point of purchase. Therefore, advertisements need to be run more frequently and their reach needs to be more extensive than generally perceived. This is the only way to make sure that the brand gets heard more and sustains the attention and interest of consumers. If the advertising is sharp and persuasive, its effectiveness would be even greater. (Tiwari, 2003)

The effectiveness of advertising can be measured as a ratio of the market share of the brand to the advertising share i.e. the share of voice of the brand. So the thumb rule is *Share of Market/Share of Voice equals advertising effectiveness*. The framework on the other hand, adds other elements to market share. According to the framework, if the media plan for a brand is efficient in maximizing its ad exposure and if it leads to higher ad spend, this would ensure the brand's visibility and higher share of voice. When the higher share of voice is combined with creative and meaningful ads, it gets a better 'top of mind recall.' This would lead to higher share of mind and the greater this share, the greater will be the preference for the brand, which will eventually lead to higher market share. (Tiwari, 2003)

Figure 13: Advertising Effectiveness Framework

```
┌─────────────────────────────────────────────────────────────────────────┐
│                    Measuring Advertising Effectiveness                    │
│                              The Framework                                │
│                                                                           │
│  Share of Spend      Share of Voice      Share of Mind    Share of Market │
│            =                    =                  =                       │
│        visibility           top of mind         preference                │
│                          recall, persuasion                               │
│                                                                           │
│         │                    │                  │                │        │
│         ▼                    ▼                  ▼                ▼        │
│         %                    %                  %                %        │
│   Brand Ad Spend      Brand Ad Exposure   Who Prefer Brand   Brand Sales  │
│   Total Category       Total Category     Total Category   Total Category │
│     Ad Spend            Ad Exposure         Consumers          Sales      │
└─────────────────────────────────────────────────────────────────────────┘
```
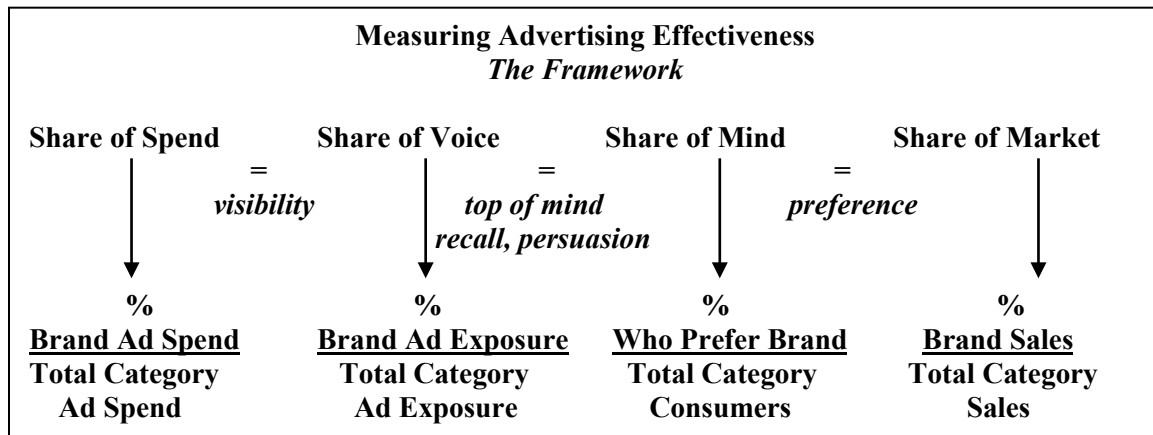
Source: Tiwari, 2003, pg 220

Although the above framework focuses on the qualitative aspect and that is the long-term goal of any marketing and advertising program which is to increase sales. But what about the immediate effect of an advertisement and whether it contains the right ingredients to eventually increase share of market. Daniel Starch in the early 1920s put forward the idea that in order to be effective advertising: (Wilmshurst, 1994)

1. Must be *seen*
2. Must be *read*
3. Must be *believed*
4. Must be *remembered*
5. Must be *acted upon*

This is a very useful checklist, against which an advertisement can be measured, to see whether it includes the necessary ingredients. The **Starch model** runs into difficulty, however, when one tries to pin down precisely what each of the 'steps' actually entail. For example does 'read' mean scan quickly or study in detail? An alternative, which is often used as a quick check on whether an advertisement 'looks right' is the **AIDA model**, which suggests that an effective advertisement is one which: (Wilmshurst, 1994)

1. Commands *attention*
2. Leading to *interest* in the product
3. And hence the *desire* to own or use the product
4. And finally to *action*, either in the form of purchase etc

Evaluating the effect of any plan's output is essential part of the planning process. Every plan has a stage where output is measured and seen whether it is in line with the set standards. If the output does not live up to its expectation than necessary changes will be made to the planning process and the whole cycle of planning, introduction, implementing and evaluating will be carried out again until the right output is not achieved. (Wilmshurst, 1994)

Reflecting on the importance of advertising, it will always be an integral part of the consumer's daily life. While advertising is believed to be a thousand years old, it only became popular and still is because of the growing population that is hungry for goods and rapidly changing technology that can make new products easily available. If one reviews the advertisements of the 30s, 50s and 70s, one would get a fascinating idea of how life was lived back then. As British writer and diplomat Norman Douglas said in 1917; "You can tell the ideals of a nation by its advertisements."(Arens, 2004)

Advertisements can be seen both as the mirror and maker of culture as they reflect the present and past and sometimes even end up shaping the future. It has evolved through the ages keeping in line with the developments in our standards of living. Advertising continues to grow in both importance and complexity. There are changes in the technology, in the creative process and even in the audiences that have paved the way for the emergence of new mediums like the Internet. Advertising has taken many forms; traditional mediums still thrive due to their various advantages but the changes in technology have further polished these mediums for advertisers to pursue for all times to come. (Arens, 2004)

2.8 Models and Frameworks:

Positioning

2.8.1 Perceptual Positioning:
2.8.1.1 Developing and Communicating a Positioning Strategy:
All marketing strategy is built on STP i.e. segmentation, targeting and positioning. A company discovers different needs and groups in the marketplace, targets those needs and groups that it can satisfy in a superior way and then positions its offering so that the target market recognizes the company's distinctive offering and image. *Positioning* is the act of designing the company's offering and image to occupy a distinctive place in the mind of the target market. The end result of positioning is the successful creation of a customer-focused *value proposition*, a cogent reason why the target market should buy the product. (Kotler, 2003)

2.8.1.2 Positioning: How many Ideas to Promote?
A company must decide how many ideas (e.g. benefits, features) to convey in its positioning to its target customers. Many marketers advocate promotion only one central benefit. A company should develop a unique selling proposition (USP) for each brand and stick to it. A consistent positioning makes for easier communication to target market; it results in employees being clearer about what counts and it makes it easier to align the whole organization with the central positioning. (Kotler, 2003)

The brand should tout itself as 'number one' on the benefit it selects. Number-one positioning's include 'best quality,' 'best performance,' 'best service,' 'best styling,' 'best value,' 'lowest price,' and 'safest,' etc. If a company consistently hammers away at

one positioning and delivers on it, it will probably be best known and recalled for this benefit. (Kotler, 2003)

Most companies can not last on one benefit; they keep on changing their positioning. As companies increase the number of claimed benefits for their brand, they risk disbelief and a loss of clear positioning. In general, a company must avoid four major positioning errors. (Kotler, 2003)

1. **Under Positioning:** Some companies discover that buyers have only a vague idea of the brand. The brand is seen just another entry in a crowded marketplace.
2. **Over Positioning:** Buyers may have too narrowed an image of the brand. Thus a consumer might think that if a retail outlet only caters to the rich, when in fact it has developed a line at affordable price.
3. **Confused Positioning:** Buyers might have a confused image of the brand resulting from the company's making too many claims or changing the brand's positioning too frequently.
4. **Doubtful Positioning:** Buyers may find it hard to believe the brand claims in view of the product's features, price or manufacturer.

Solving the positioning problem enables the company to solve the marketing-mix problem. Seizing the 'high quality position,' requires the firm to product high-quality products, charge a high price, distribute through high-class dealers and advertise in high-quality magazines. (Kotler, 2003)

Marketers have to go a step further and determine where the product actually stands in the minds of consumers? One technique is to ask customers what attributes are important to them, and how they feel competitors rate on these attributes. This information can be used to construct a ***perceptual map***, which is a vivid way to paint a picture of where products or brands are 'located,' in consumers' minds. (Solomon, 2005) According to Philip Kotler, perceptual mapping is a graphics technique used by marketers to attempt to visually display the perceptions of customers or potential customers. Typically the position of a product, product line, brand, or company is displayed relative to their competition. Perceptual maps can have any number of dimensions but the most common is two dimensions. Any more is a challenge to draw and confusing to interpret. (Kotler, 2003)

According to Philip Kotler and Michael R. Solomon, there are different positioning possibilities:

1. **Attribute Positioning:** A company positions itself on an attribute, such as size or number of years in existence.
2. **Benefit Positioning:** The product is positioned as the leader in a certain benefit.
3. **Use or Application Positioning:** Positioning the product as best for some use or application.
4. **User Positioning:** Positioning the product as best for some user group.

5. **Competitor Positioning:** The product claims to be better in some way than a named competitor.
6. **Product Category Positioning:** The product is positioned as the leader in a certain product category.
7. **Quality or Price Positioning:** The product is positioned as offering the best value.

2.8.1.3 Communicating the Company's positioning:

To communicate a company or brand positioning, a marketing plan should include a *positioning statement*. The statement should follow the form: To (target group and need) our (Brand) is (concept) that (point of difference). Once the company has developed a clear positioning statement, it must communicate that positioning effectively through all elements of the marketing mix. First step is to determine the dimensions along which the perceptual maps will be drawn. Once that is done, maps are drawn and market share is calculated, this will help determine the product or service's status in the BCG matrix. (Kotler, 2003)

2.8.2 The Boston Consulting Group Approach:

Large companies normally manage quite different businesses, each requiring its own strategy. A SBU has three characteristics: (Kotler, 2003)

1. It is a single business or collection of related businesses that can be planned separately from the rest of the company.
2. It has its own set of competitors.
3. It has a manager who is responsible for strategic planning and profit performance and who controls most of the factors affecting profit.

The purpose of identifying the company's strategic business units is to develop separate strategies and assign appropriate funding. Senior management knows that its portfolio of businesses usually includes a number of "yesterday's has-beens" as well as "tomorrow's breadwinners." Yet is cannot rely on impressions; it needs analytical tools to classify its businesses by profit potential. One of the best-known business portfolio evaluation models is Boston Consulting Group model. (Kotler, 2003) *BCG Matrix not only helps in evaluating a company's portfolio but can also be used to analyze several companies within a specific industry. Therefore BCG can help explore a sector of the economy in terms of its market growth rate and can also determine the market share of each company operating within the sector. Instead of just evaluating a company's portfolio, the whole company is compared with every competitor competing in the industry.*

2.8.2.1 BCG Growth-Share Matrix:

The Boston Consulting Group (BCG), a leading management consulting firm, developed and popularized the growth-share matrix shown in Figure 14. The horizontal axis measures the relative market share and the vertical axis measures market growth rate. The market growth rate indicates the annual growth rate of the market in which the business operates. Relative market share refers to the SBU's market share relative to that of its largest competitor in the segment. It serves as a measure of the company's strength in that

market segment. Relative market share is drawn in log scale, so that equal distances represent the same percentage increase. (Kotler, 2003)

The market share of each company/business unit is calculated by first identifying the attributes that customers feel are important for evaluating a company's performance. If there are six companies/units, they are ranked against each attribute on a rating scale from 1 to 6, 1 being the lowest and 6 being the highest. Once the ranking is done, each attribute is assigned a weighted index, which always equals 1.00. The next step is to calculate the market share by multiplying the rating scale of each company/unit with the weighted index. Once that is done, each company's total is calculated which is the derived market share. The market growth rate is determined by identifying the industry trend and looking at various industry reviews that explain the growth factors of the relevant sector. The market share is plotted on the x-axis of the BCG matrix. The scale starts from 0 at the right and ends with a 1 on the left. The matrix is divided at 0.5 from the middle. Each company/unit is plotted on the matrix according to the calculated market shares. The growth-share matrix is divided into four cells, each indicating different type of business. Following is a description of each on of them.

2.8.2.1.1 Cash Cows:
Cash cows are units or products with high market share in a slow-growing industry. These units typically generate cash in excess of the amount of cash needed to maintain the business. Usually this implies that the revenue they generate can be used to develop one or more 'question mark.' This process, referred to as 'milking your cash cow.' (Kotler, 2003)

2.8.2.1.2 Dogs:
Dogs, or more charitably called pets are units with low market share in a mature, slow-growing industry. These units typically 'break even,' generating barely enough cash to maintain the business's market share. From an accounting point of view such a unit is worthless, not generating cash for the company. Dogs, it is thought, should be sold off. (Kotler, 2003)

2.8.2.1.3 Question Marks:
These are businesses that operate in high-growth markets but have low relative market shares. A question mark requires a lot of cash because that company has to spend money on plant, equipment, and personnel to keep up with the fast-growing market and because it wants to overtake the market leader. The company has to think hard about whether to keep pouring money into this business. (Kotler, 2003)

2.8.2.1.4 Stars:
These are market leaders in a high-growth market. A star does not necessarily produce a positive cash flow for the company. The company must spend substantial funds to keep up with high market growth and to fight off competitors' attacks. (Kotler, 2003)

Figure 14: Boston Consulting Group's Growth-Share Matrix

Relative Market Share

	High	Low
High	Stars	Question Marks
Low	Cash Cow	Dogs

Market Growth Rate
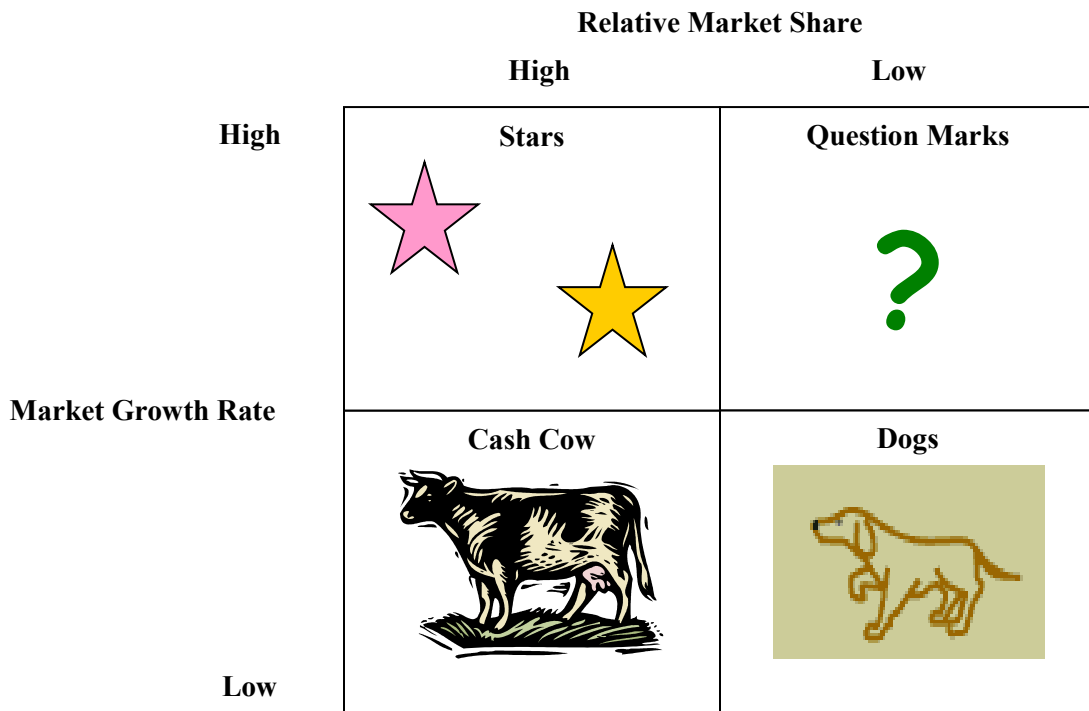
Source: Kotler, 2003, pg 94

Consumer

2.8.3 Target Market:

The simplest way to define a market is to think of it as consisting of all the people or organizations that may have an interest in purchasing a company's products or services. In other words, a market comprises of all customers who have needs that may be fulfilled by an organization's offerings. Target market is who the company aims its marketing efforts at. This is the group that the company wants to sell its products or services to. They have an interest in what it is that the company has to offer. The target market can be broken down into segments that can include demographics, psychographics, income levels and age levels. (Kotler, 2003)

2.8.4 Lifestyles and Psychographics:

One way to segment the consumer market is through the lifestyle and psychographics. *Lifestyle* refers to a pattern of consumption reflecting a person's choices of how he or she spends time and money. A lifestyle marketing perspective recognizes that people sort themselves into groups on the basis of the things they like to do, how they like to spend their leisure time, and how they choose to spend their disposable income. The relationship between psychographics and lifestyles is hard to highlight, as one cannot easily relate them. Psychographics deal with mental profiling. Thus, it pertains to the consumer's cognitive style. (Solomon, 2005)

One can say that psychographics is the systematic use of relevant activity, opinion and interest constructs to quantitatively explore and explain the communicating, purchasing

and consuming behaviors of persons for brands and products. Psychographics can thus be viewed as the method of defining lifestyle in measurable terms. Psychographics has two important marketing applications. First, analyzing consumers in terms of psychographic helps marketers identify consumer types or market segments. Second, psychographic research helps uncover the attitudes, interests, and opinions which are as follows in the form of AIOD framework. (Solomon, 2005)

2.8.4.1 AIOs:
Most contemporary psychographic research attempts to group consumers according to some combination of three categories of variables-*activities, interests and opinions*. This framework has a wide application across many markets. AIOD framework enables the marketer to thoroughly understand his/her customers and allows them to communicate more effectively with them. This type of segmentation measures, how people spend their time, what is of most interest to them in their immediate surroundings and their opinions and views about themselves and the world around them. Demographic information is then added to the three aspects to construct the user's profile. Each group represents a different pattern of needs for a given product. (Solomon, 2005)

To group consumers into AIO categories, respondents are given a long list of statements and are asked to indicate how much they agree with each one. (See Table 3, it lists the commonly used AIO dimensions.) Typically, the first step is to determine the heavy, moderate and light users of a product. Once that is done, it is determined what benefit each type of user derives from the product. The benefit column is added to the left of the AIO table and then following columns determine the activities, interests and opinions of the people who desire the stated benefits. (Solomon, 2005)

Table 3: Lifestyle Dimensions

Activities	Interests	Opinions	Demographics
Work	Family	Themselves	Age
Hobbies	Home	Social Issues	Education
Social Events	Job	Politics	Income
Holidays	Community	Business	Occupation
Entertainment	Recreation	Economics	Family size
Clubs	Fashion	Education	Dwelling type
Community	Food	Products	Geography
Shopping	Media	Future	City Size
Sports	Achievements	Culture	Stage in cycle

Source: Solomon, 2005, pg 206

2.8.5 Consumer Attitudes and Values:
An attitude is a mental position taken toward a topic, person, or event that influences the holder's feelings, perceptions, learning processes and subsequent behaviors. From a marketing perspective, attitudes drive purchases. If a consumer has positive attitude

toward a brand, the propensity to actually purchase that brand is higher. If a consumer appreciates an advertisement, the probability of purchasing that product increases. An attitude consists of three components: affective, cognitive and co native. The affective component contains the feelings or emotions a person has about the object, topic or idea. The cognitive component refers to a person's mental images, understanding and interpretation of the person, object or issue. The conative component is an individual's intentions, actions or behavior. The most common sequence of events as an attitude forms is as follows: (Clow and Baack, 2003)

Figure 15: Attitude Sequence I
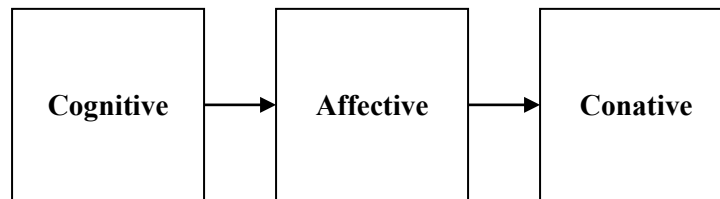
Source: Clow and Baack, 2003, pg 65

In other words, a person first develops an understanding about an idea or object. In the case of marketing, these ideas center on the nature of the good or service. Thoughts about the product emerge from watching or reading an advertisement. They may result from exposures to information from other sources, such as internet or a friend's referral. Eventually these thoughts become either positive or negative. The affective part of the attitude is the general feeling or emotion a person attaches to the idea. The decision and action tendencies are the conative part of the attitude. Attitudes can develop in other ways. An alternative process may be: (Clow and Baack, 2003)

Figure 16: Attitude Sequence II
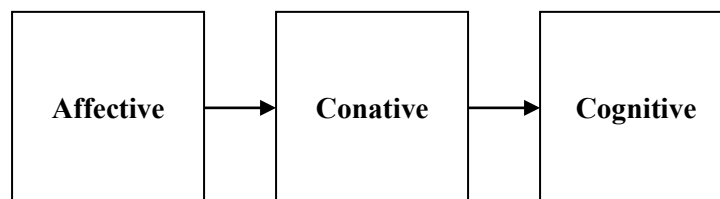
Source: Clow and Baack, 2003, pg 66

In marketing, advertisements and other communications often appeal first to the emotions or feelings of the consumer. The goal is to get a consumer to 'like' a product and then make the purchase after which the cognitive understanding of the product follows. Some attitudes result from a third combination of the components: (Clow and Baack, 2003)

Figure 17: Attitude Sequence III
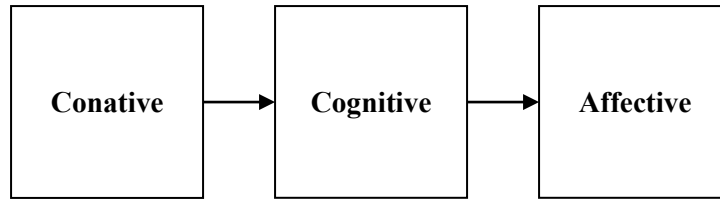
Source: Clow and Baack, 2003, pg 66

Purchases that require little thought, have a low price, or do not require a great deal of emotional involvement might follow this path. These three components are essential part of the consumer decision making model. Even when advertisers are developing advertisements, they keep in mind these three components of attitudes. One theoretical framework that advertisers used in developing advertising campaign is hierarchy of effects models that is built along the same lines of the above stated components. (Clow and Baack, 2003)

2.8.5.1 Hierarchy of Effects Model:
The hierarchy of effects model helps in clarifying the objectives of an advertising campaign as well as the objective of a particular advertisement. It also aids the marketing team in identifying the best communications strategy. The model suggests that a consumer or a business buyer moves through this series of six steps when becoming convinced to make a purchase: (Clow and Baack, 2003)

Figure 18: Hierarchy of Effects Model
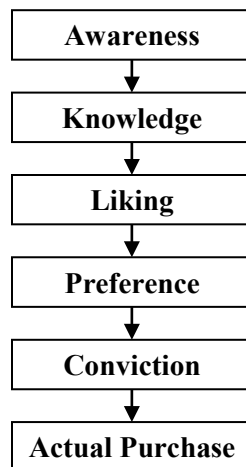
Source: Clow and Baack, 2003, pg 195

The steps are sequential. Consumers spend a period of time at each step before moving to the next. Thus, before a person can develop a liking for a product, he or she must first

have sufficient knowledge of the product. Once the individual has the knowledge and develops liking for the product, the advertiser can try to influence the consumer to prefer a particular brand or company more strongly. (Clow and Baack, 2003)

The major benefit of the hierarchy of effects model is that it is one method used to identify the typical steps consumers and businesses take when making purchases. To encourage brand loyalty, all six steps must be present. A consumer or business is unlikely to be loyal to a particular brand without sufficient knowledge of the brand. Purchasers must like the brand and build a strong preference for it. Next, they must cultivate strong convictions that the particular brand is superior to the other brands on the market. None of this occurs without first becoming aware of the product. Thus, the components of the hierarchy of effects approach highlight the various responses that advertising must accomplish. The model has been derived from the three components of attitudes. Following table shows each level of the hierarchy and the components of attitude. (Clow and Baack, 2003)

Table 4: Hierarchy of Effects and Components of Attitude

Awareness Knowledge	Cognitive
Liking Preference	Affective
Conviction Actual Purchase	Conative

Source: Clow and Baack, 2003, pgs 65 and 195

2.8.6 Consumer Purchase Process:
In today's' highly competitive market the goal of any marketer is to constantly attempt to influence the consumer into buying the product. Therefore marketing managers are always in the process of developing messages that entice buyers to purchase the product or service. But advertised message is not the only factor that influences the decision making process. (Clow and Baack, 2003)

Figure 19: Consumer Decision Making Process

```
┌─────────────────────────────┐
│     Problem Recognition      │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│      Information Search      │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│   Evaluation of Alternatives │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│      Purchase Decisions      │
└─────────────────────────────┘
              │
              ▼
┌─────────────────────────────┐
│   Post Purchase Evaluation   │
└─────────────────────────────┘
```
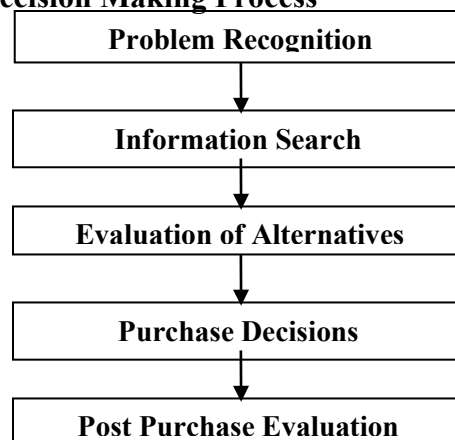
Source: Clow and Baack, 2003, pg 61

The *process initiates only when the customer realizes that a need exists*, the customer than goes through each step of the process in pursuit to satisfy that particular need. The traditional process as highlighted in the figure starts with problem recognition then moves on to information search, alternatives are further evaluated for suitability and finally the product is purchased but buying the product does not mean the need is satisfied this only happens when the post purchase evaluation phase achieves positive results then one can say the problem is solved and need satisfied. (Clow and Baack, 2003)

Now each step is unique for the customer when the customer is trying to satisfy the need. In the first step the customer realizes that a ***problem*** exists when the desired state is different from the actual state. For example before going to the office Mike wants to have milk and cereal but when he looks in the refrigerator for milk and there isn't any then a need for milk arises automatically and Mike would want to satisfy it immediately by shopping for it on his way to work. But this is a simple example in which some of the steps would be skipped since it is a low cost product but if it is an expensive product than the customer will go through all the steps of the decision making process. (Clow and Baack, 2003)

The second step focuses on ***internal and external search for information*** to help aid the consumer's decision. Consumer can refer back to their prior experiences, or basically refer back to their memory about the product alternative or can go out in the market and search for new information provided at stores or get information from advertisements as well. Once this step ends, the customer has some ***set alternatives*** as possible candidates for the purchase. The alternatives can be evaluated either through affect referral that is the individual chooses the product he or she likes the best or through multi-attribute approach where customer examines the attributes for each product or by referring to the evoked set that already has brands considered during the second and third step. (Clow and Baack, 2003)

After this step ***purchase decision*** is made. Once the customer buys the product the need is satisfied and the problem is hence solved. The consumer decision process does not end with the purchase; the last step is ***post-purchase evaluation***. After using the product or service, the consumer compares the level of performance with the expectations. Satisfaction occurs when the consumer's expectation are either met or exceeded, and dissatisfaction results when performance is below expectations. The post purchase evaluation is important because the feedback acquired from the actual use of a product will influence the likelihood of future purchases. Positive performance means that the brand is retained in the evoked set and increases the likelihood that it will be purchased again, and vice versa. (Clow and Baack, 2003)

2.8.7 FCB Planning Model:
An interesting approach to analyzing the communication situation comes from the work of Richard Vaughn of the Foote, Cone & Belding advertising agency. Vaughn and his associates developed an advertising planning model by building on traditional response theories such as the hierarchy of effects model and its variants and research on high and low involvement. They added the dimension of thinking versus feeling processing at each involvement level by bringing in theories regarding brain specialization. The right/left brain theory suggests the left side of the brain is more capable of rational, cognitive thinking, while the right side is more visual and emotional and engages more in the affective (feeling) functions. Their model, which became known as the FCB grid, delineates four primary advertising planning strategies: informative, affective, habit formation and satisfaction as well as the most appropriate variant of the alternative response hierarchies. (See Figure 20) (Belch and Belch, 1998)

Vaugh suggests that the *informative strategy* is for highly involving products and services where rational thinking and economic considerations prevail and the standard learning hierarchy is the appropriate response model. The affective strategy is for highly involving/feeling purchases. For these types of products, advertising should stress psychological and emotional motives such as building self-esteem or enhancing one's ego or self-image. (Belch and Belch, 1998)

The *habit formation strategy* is for low-involvement/thinking products with such routinized behavior patterns that learning occurs most often after a trial purchase. The response process for these products is consistent with a behaviorist learning-by-doing model. The *self-satisfaction strategy* is for low-involvement/feeling products where appeals to sensory pleasures and social motives are important. Again, the do-learn-feel or do-learn hierarchy is operating, since product experience is an important part of the learning process. Vaughn acknowledges that some minimal level of awareness (passive learning) may precede purchase of both types of low-involvement products, but deeper, active learning is not necessary. This is consistent with the low-involvement hierarchy that is learn-do-feel. (Belch and Belch, 1998)

The FCB grid provides a useful way for those involved in the advertising planning process, such as creative specialists, to analyze consumer/product relationships and develop appropriate promotional strategies. Consumer research can be used to determine how consumers perceive products or brands on the involvement and thinking/feeling dimensions. This information can be used to develop effective creative options such as using rational versus emotional appeals, increasing involvement levels, or even getting consumers to evaluate a think-type product on the basis of feelings. (Belch and Belch, 1998)

Figure 20: The Foote, Cone & Belding (FCB) Grid

	Thinking	Feeling

High Involvement	1**. Informative (thinker)**
	Car-house-furnishings-new products
	Model: Learn-feel-do
	Possible implications
	Test: Recall, Diagnostics
	Media: Long copy format
	    Reflective vehicles
	Creative: Specific information
		2. **Affective (feeler)**
		Jewelry-cosmetics-fashion apparel-motorcycles
		Model: Feel-learn-do
		Possible implications
		Test: Attitude change,
		    Emotional arousal
		Media: Large space,
		    Image specials
		Creative: Executional impact

Low Involvement	3. **Habit formation (doer)**
	Food-household items
	Model: Do-learn-feel
	Possible implications
	Test: Sales
	Media: Small space ads
	    10 second I.D.'s
	    Radio; POS
	Creative: Reminder
		4. **Self- satisfaction (reactor)**
		Cigarettes-liquor-candy
		Model: Do-feel-learn
		Possible implications
		Test: Sales
		Media: Billboards
		    Newspapers
		    POS
		Creative: Attention

Source: Belch and Belch, 1998, pg 15

2.8.8 Message Strategies

The message theme is the outline of the key ideas in the ad and it is the central part of the creative brief. The message theme can be created using a number of message strategies. A message strategy is the primary tactic used to deliver the message theme. There are four broad categories of message strategies and the first three represent the components of attitudes, as discussed earlier in the consumer attitude section. (Clow and Baack, 2003)

2.8.8.1 Cognitive Strategies

A cognitive message strategy is the presentation of rational arguments or pieces of information to consumers. The advertisement's key message focuses on the product's attributes or the benefits customers obtain from using the product. The product's attributes include a huge range of benefits. Cognitive message strategies should make these benefits clear to potential customers. There are five major forms of cognitive strategies that are explained in table 5. (Clow and Baack, 2003)

2.8.8.2 Affective Strategies

Affective message strategies invoke feelings and emotions and match them with the product, service or company. They try to enhance the likeability of the product, recall of the appeal, or comprehension of the advertisement. Affective strategies elicit emotions that, in turn, affect the consumer's reasoning process and finally lead to action. Affective strategies fall into two categories that is resonance and emotional, which are explained in table 5. (Clow and Baack, 2003)

2.8.8.4 Conative Strategies

Co-native messages strategies are designed to lead more directly to some type of consumer behavior. They can be used to support other promotional efforts, such as coupon redemption programs, internet 'hits' and orders and in-store offers such as buy-one-get-one-free. The goal of this strategy is to elicit behavior. A conative strategy is presented in television advertisements and prints ads that induce customers to buy the product. Action-inducing conative advertisements and promotional support conative advertisements are explained in table 5. (Clow and Baack, 2003)

2.8.8.5 Brand Strategies

The final category of message strategy is not directly oriented to consumer attitudes. Instead, brand message strategies build or enhance the brand or corporate name in some way. Brand strategies can be placed in four categories: brand user, brand image, brand usage and corporate advertising. (See Table 5) The primary goal of each of these brand strategy approaches is to develop the brand including its image, awareness of the brand, and positive reactions to the brand. The message strategy is a key component of every advertising program. To be effective, the message strategy must be matched carefully with the media used and the executional framework. (Clow and Baack, 2003)

Table 5: Advertising Design: Message Strategies

Cognitive Strategies	
Generic messages	They are direct promotions of product attributes or benefits without any claim of superiority.
Preemptive messages	They are claims of superiority based on a specific attribute or benefits of a product.
Unique Selling Proposition	It is an explicit, testable claim of uniqueness or superiority that can be supported or substantiated in some manner.
Hyperbole	This approach makes an un-testable claim based upon some attribute or benefit.
Comparative Advertisement	When an advertiser directly or indirectly compares a good or service to the competition.
Affective Strategies	
Resonance Advertising	It attempts to connect a product with a consumer's experiences to develop stronger ties between the product and the consumers.
Emotional Advertising	It attempts to elicit powerful emotions that eventually lead to product recall and choice.
Conative Strategies	
Action-Inducing Advertisements	They create situations in which cognitive knowledge of the product or affective liking of the product may come later after the purchase.
Promotional Support	These advertisements are designed to support other promotional efforts.
Brand Strategies	
Brand user	This strategy focuses on types of individuals that use a particular brand.
Brand Image	This strategy works towards the development of a 'brand personality.'
Brand Usage	This strategy stresses the different uses for a particular brand.
Corporate	This type of advertising promotes the name and image of company

Source: Clow and Baack, 2003, pgs 231-237

2.8.9 Advertising Design: Types of Appeals

Seven major types of appeals have been the most successful. Advertisers usually select from one of these types of appeals as they develop the advertisement. The following table states all of them. (Clow and Baack, 2003)

Table 6: Advertising Appeals

Fear	Advertisers use fear to sell a variety of products. Fear increases both the viewer's interest in an advertisement and the persuasiveness of that ad. Many individuals remember advertisements with fear appeals better than they do warm, upbeat messages.
Humor	Clutter is a significant problem in any advertising medium. This makes capturing someone's attention quite difficult. Once the advertiser has the audiences' attention, keeping that attention becomes even more challenging. Humor has proven to be one of the best techniques for cutting through the clutter. Humor is effective both in getting attention and keeping it.
Sex	As advertisers look for ways to break through the advertising clutter, they use sexual appeals with increasing regularity. Sexuality has been employed in advertising in five ways including: subliminal techniques in which advertisers place sexual cues or icons in advertisements to affect a viewer's subconscious mind.
Music	Music is an extremely important component in advertising. Music helps capture the attention of listeners and is linked to emotions, memories, and other experiences. Music gains attention and increases the retention of visual information at the same time. A match between the music and the ad theme can lead to a strong favorable reaction by the viewer or listener.
Rationality	Rational appeals are normally based on the hierarchy of effects model. The approach assumes consumers use rational thought processes when making purchase decisions. The goal of a rational appeal is to provide the information needed to help make the decision.
Emotions	These are based on three ideas. First, consumers ignore most advertisements. Second, rational appeals go unnoticed unless the consumer is in the market for a particular product at the time it is advertised. Third and most important, emotional advertising can capture a viewer's attention and help develop an attachment between consumer and brand. Most creatives view emotional advertising as the key to developing brand loyalty.
Scarcity	When there is limited supply of product, the value of the product increases. Scarcity appeals urge consumers to buy a particular product because of a limitation. The limitations can be limited number of products available or, more often, that the product is only available for a limited time.

Source: Clow and Baack, 2003, pgs 201-218

2.8.10 Advertising Design: Executional Frameworks

An executional framework is the manner in which an ad appeal is presented. The ad appeal is like the script in a movie (e.g., comedy, drama, action film). The ad appeal spells out the overriding format to be used. A few of the executional frameworks are explained in the following table: (Clow and Baack, 2003)

Table 7: Advertising Design: Executional Frameworks

Animation	Animation in advertising has increased due primarily to the greater sophistication of computer graphics programs. Animation is mostly used in television spots, although it can also be produced for movie trailers and internet ads. Single shots of animated characters can also be placed into print ads.
Slice of life	In slice-of-life commercials, advertisers attempt to provide solutions to the everyday problems that consumers face. These adverts normally show common things people experience, especially problems they encounter. Then the good is made available to solve the problem. Actors portray the dilemma or problem and sometimes solve the problems themselves. In others, a voice-over explains the benefits or solutions to the problem that the product provides. Slice-of-life executional frameworks are possible in most media, including magazines or billboards, because a single picture can depict a normal, everyday situation or problem. The secret is to let one image tell the entire story, with the product being the solution.
Dramatization	A dramatization is similar to slice-of-life executional framework. It uses the same format of presenting a problem, then a solution. The difference lies in the intensity and story-format. Dramatization uses a high level of excitement and suspense to tell the story.
Testimonial	A testimonial type of executional framework has been successful for many years. When a consumer in an advert tells about the positive experience with a product, this is a testimonial. One major reason companies choose testimonials is that they enhance company credibility. Endorsers and famous individuals do not always have high levels of credibility because consumers know they are being paid for their endorsements.
Authoritative	In using authoritative executional framework, an advertiser seeks to convince viewers that a given product is superior to other brands. One form is expert authority. These ads employ a physician, dentist, engineer or chemist to state the product's advantages over other products. Many authoritative adverts include some type of scientific or survey evidence. When they do, the authoritative approach works most effectively in print ads when buyers take the time to read the claim or findings the advert provides. Authoritative ads work especially well in specialty magazines.
Demonstration	Advertisements using the executional framework show how a product works. A demonstration is an effective way to communicate the attributes of a product to viewers. Other product benefits can be described as the product is exhibited. Demonstration ads are specially suited to television.
Fantasy	Some products lend themselves to the fantasy type of executional framework. Fantasy executions are designed to lift the audience beyond the real world to make-believe experience. Some fantasies are meant to be realistic. Others are completely irrational. Often the more irrational and illogical, the more consumers recall theme.
Informative	Informative ads present information to the audience in a straightforward matter. Consumers interested in a particular brand will only pay attention to an informative ad.

Source: Clow and Baack, 2003, pgs 238-244

2.9 The Elements of Outdoor:

Outdoor advertising campaign like ever other medium needs to be planned in advance before the advertisers can carry out the campaign. The outdoor campaign combines three elements: *designing, buying and verifying*. Designing the outdoor message is of most importance because there are certain guidelines that need to be followed to ensure that outdoor achieves the desired marketing objectives. (Russell and Lane, 1996)

According to William F. Arens, outdoor advertising is generally viewed from 100 to 500 feet away by people who are in motion. So the message must be simple, brief and easy to understand, therefore large illustrations, bold colors, simple backgrounds, clear product identification and easy-to-read lettering are necessary for consumer comprehension. (Arens, 2004)

2.9.1 Designing:

Designing an outdoor display is among the most difficult tasks for a creative team. The reason being that fast moving traffic has to view the ads therefore creating a picture with a few words is indeed difficult. However, outdoor is one of the most enjoyable media to work with from a creative standpoint. According to J. Thomas Russell and W. Ronald Lane, "its size and color allow maximum creativity without the constraints of other advertising vehicles." (Russell and Lane, 1996)

2.9.1.1 Type Weight and Spacing:

William F. Arens and J. Thomas Russell and W. Ronald Lane both agree that seven words are the recommended maximum requirement for outdoor copy. Therefore only the headline will be displayed. The text must be legible by the reader from quiet a distance. The bold typefaces usually appear blurred and thin ones seem faded, whereas ornate are too complicated, thus simple sans serif text font should be used. The kerning that is the spacing between the letters and words should be separated enough to reduce confusion. (Arens, 2004)

2.9.1.2 Color Contrast and Value:

Color is one of the primary advantages of outdoor. Outdoor designers choose colors that create high contrast in both *hue (red, green, etc.) and value (a measure of lightness or darkness)*. (Russell and Lane, 1996) In outdoor advertising, a full range of colors can be vividly and faithfully reproduced. A huge poster alive with brilliant colors like red, green, yellows and blues with make quiet an impact. The color wheel is the best way to choose for both hue and value. Some color combinations have an effect on the audience while others do not reflect an action. Advertisers should be experts on developing excellent eye popping billboards that contain minimal text but great graphics that have a long lasting impression. (Arens, 2004)

2.10 Why Outdoor Advertising?

In an era of information overload, outdoor has the ability to stand out, break through, and instill memorability. Following are the unique advertising opportunities that outdoor media offers. (Outdoor Advertising Association of America, 2005)

2.10.1 Message Immersion:

In the last ten years, the outdoor industry has exploded in shape, size, and placement; allowing an advertiser to follow a consumer through his or her day. This strategy of *message immersion* had become quite popular with many brands. Outdoor displays are located wherever consumers travel, so if they miss one message, the next one is just down the street or in the mall or on the subway train or at the stadium. Outdoor can completely surround consumers with hundreds of message contacts each day. (Outdoor Advertising Association of America, 2005)

2.10.2 Continuing Presence and Immediacy:

Outdoor enables long-term product recognition through message continuity and placement at the point-of-sale, just moments before a buying decision. So it helps in the making decisions for customers. The main purpose of any outdoor media is to create brand awareness and inform the customer that the product exists. Usually new products gain a mass appeal, once they appear on billboards and customers tend to relate to them and recognize as well as recall them when making a purchase. (Outdoor Advertising Association of America, 2005)

2.10.3 Locally Delivered with a National Appeal:

The strength of outdoor media lies in its ability to customize national campaigns into relevant local messages. Hence advertisers can take big brands and give them a local touch and make them more accessible by converting the advertising message to speak to individual markets. A particular media being used to convey a message may only be targeting the elite and hence it will be placed in locations like spas, hotels and restaurants etc. (Outdoor Advertising Association of America, 2005)

2.10.4 Targeting the Masses:

Since outdoor is a mass medium it can be all things to all people. It has always been viewed as an efficient mass medium, but through geographic selectivity a brand message can be targeted with pinpoint accuracy. Outdoor can reach the masses and the individual equally well, or any combination in between. This is the biggest opportunity of outdoor; it costs less and still targets many people but also individual customer segments. Television and print are very expansive, even though they are mass mediums but the cost effectiveness of outdoor is an advantage. (Outdoor Advertising Association of America, 2005)

2.10.5 More Ways to Encourage Expression:

Outdoor media is a highly diverse composite of shapes and sizes, enabling an advertiser to custom design an ad program that is ideally suited for its needs. Combining traditional billboards with newer forms of outdoor media will improve

the communication results by improving reach and frequency. There are many different forms of outdoor media available that advertisers can use to give their message to the customer. Many advertisers use outdoor mediums with other media like radio, television, print and electronic. (Outdoor Advertising Association of America, 2005)

2.10.6 Easier to Plan and Buy:

Today the outdoor industry has many forms of measurement available to confirm its performance. The use of online technology is making the medium simpler to buy, with outdoor companies investing in sophisticated systems to help advertisers make educated decisions about outdoor opportunities in markets across the nation. Now-a-days the measurement of performance is not that difficult. Advertisers are looking at annual sales as well as customer's view point about the various billboards that are displaying their message around the city. The main focus of performance is whether customers can recall or recognize the brand, once it is displayed on site. (Outdoor Advertising Association of America, 2005)

2.11 Pros and Cons of Outdoor Advertising:

Outdoor is a dominant medium that combines high levels of reach and frequency, a colorful presentation of products and low CPM costs, while reaching an audience already in the marketplace. Outdoor advertising is one of the last opportunities to reach consumers before they make a purchase. Basically, in other words it combines the best features of radio and point-of-purchase. Outdoor is also well suited to enhance the effectiveness of other advertising media. It can function as a supplement to other mediums like radio, television or print or be a stand alone primary medium. Although outdoor boasts of many advantages but there are some limitations as well. Following is a list of the pros and cons of outdoor advertising: (Russell and Lane, 1996)

2.11.1 Pros:

2.11.1.1   Accessibility:

Outdoor carries the message 24 hours a day and cannot be fast-forwarded, put aside, zapped, or turned off. It can reach a large number of the target audience in a particular locality at minimum cost. (Arens, 2004) So it can gain wide and repeated exposure if it is in the proper location. (Bovee and Thill, 1995) Outdoor has full time audience therefore it needs the message to be clearly accessible and readable. (Competitive Media Facts, 2006)

2.11.1.2   Geographic Flexibility:

Outdoor advertisers can place their advertising where they want it nationally, regionally or locally. (Arens, 2004) Billboards can be placed at high-traffic areas or other strategic locations, while transit signs can be affixed to the backs and sides of buses, in bus stops, and in rail stations. (Competitive Media Facts, 2006)

2.11.1.3   Cost:
Outdoor offers the lowest cost per exposure of any major advertising medium. (Arens, 2004) According to Competitive Media Facts, "Outdoors' cost-per-thousand is significantly lower than that of any other advertising medium and in some cases by a factor of ten or even twenty." Similarly J. Thomas Russell and W. Ronald Lane, state that "outdoor is the most efficient of all mass media. Outdoor costs seven times less than television, three times less than newspapers and half as much as radio." (Russell and Lane, 1996)

2.11.1.4   Impact:
Outdoor is the ideal medium for those with a short, simple and dogmatic message. (Arens, 2004) Outdoor is known for its brevity. Outdoor advertising is effective for communicating short messages and simple ideas or concepts. The elements of outdoor specifically state that outdoor messages need to follow strict guidelines if they want to make an impact on consumers. Therefore the combination of size, color, and illumination need to attract attention. (Competitive Media Facts, 2006)

2.11.1.5   Creative Flexibility:
Outdoor offers a large display and the spectacular features of lights, animation, and brilliant color. New technologies offer more creative options. (Arens, 2004) The creative choices for billboards and other outdoor ads are almost endless. Color, typeface, size and shape can be varied but inline with the designing guidelines and advertisers can use three dimensional elements, inflatables, lights and other attention getting techniques. (Bovee and Thill, 1995)

2.11.1.6   Location:
Outdoor can target consumers by activity, reaching shoppers on their way to the store, businesspeople on their way to work, or travelers on their way to the airport, thereby influencing shoppers just before they make a purchase decision. (Arens, 2004)

2.11.2   Cons:

2.11.2.1   Fleeting Message:
Cars drive by quickly; therefore advertisers must ensure that the design and copy of the billboard must tell a brief story and be able to attract attention. (Arens, 2004) The very nature of outdoor advertising demands that the commercial message be brief and relatively simple. Therefore, it is difficult to communicate product details, competitive advantages, and specific consumer benefits. (Competitive Media Facts, 2006)

2.11.2.2   Audience Measurement:
It is difficult to measure as not every passerby sees or reads the ad. (Arens, 2004) Unlike other advertising media, outdoor advertising has no truly reliable method to measure its effectiveness. There are a few studies extant, but they mostly apply to limited geographical areas and employ widely varying methodologies. (Competitive Media Facts, 2006)

2.11.2.3   Availability of Locations:
Outdoor is so popular that demand now exceeds supply. (Arens, 2004) There is also the issue of limited availability. Prime outdoor locations in high-traffic areas often are controlled by large, long-term advertisers. Construction of new billboards is restricted by costs, space availability, and rigid municipal codes and environmental regulations. (Competitive Media Facts, 2006)

2.11.2.4   Visual Pollution:
Many people object to outdoor advertising. They have negative reactions towards advertisers who use this medium. (Arens, 2004) Commuters behind the wheel and other potential customers are exposed very briefly to outdoor messages, minimizing message retention. Such adverse conditions as heavy traffic or bad weather also can limit message impact and recall. (Competitive Media Facts, 2006)

2.11.2.5   Message Wear out:
After an outdoor ad has been up a while, people may become indifferent to the ad or get tired of seeing the same message day and night. To avoid this, advertisers need to periodically change the message or its execution. Some people even call billboards "litter on a stick," and want them banned or at least their number or size reduced. (Bovee and Thill, 1995)

2.12 Out-of-Home Advertising; Blending Old with the New:

Advertising is virtually everywhere in our daily life. It is a form of selling that is both contested and admired at the same time. (Bovee and Thill, 1995) For thousands of years there have been individuals who have tried to persuade others to buy the food they have produced or the goods they have made. Whatever they wanted to sell, they all had to do one thing and that was, advertise. (Bovee and Thill, 1995)

As a consumer, one is exposed to hundreds and maybe even thousands of commercial messages every day. They may appear in many forms and evidence of this growth is all around us: in the store, in newspapers, in magazines, on television, on the radio, on buses, on billboards and even through e-mails. These are just a few of the many communication mediums that organizations use to initiate and maintain contact with their customers. (Arens, 2004)

Advertising that reaches people away from home, that is when ads are positioned in the outdoors; on buses and taxicabs etc than it is called *out-of-home advertising*. It performs

the same purpose of increasing brand recognition and recall like every other medium but the only difference is that the message is displayed in the outdoors. Now advertisers are finding that the creative approaches possible in out-of-home advertising can help grab audience attention in unexpected ways and in unusual places. As an alternative to the mass media, out-of-home advertising is often cost-effective way to quickly reach large areas or local communities. (Bovee and Thill, 1995)

More than ever before, today, there are more than 30 different *types* of out-of-home advertising generating billions in revenues. The most common are on-premise signs, which basically identify a place of business. For examples the golden arches of McDonald's franchises. But these just help in finding the place of business, they are not an organized medium like outdoor advertising. Generally out-of-home advertising can be displayed in malls, airports, sports stadiums, bus shelters, inside stores, on 8-sheet posters, 30-sheet posters and bulletins. (Arens, 2004)

The modern era of outdoor advertising was introduced when the automobile created a mobile society. Besides this the outdoor also benefited from new printing techniques and a growing advertising industry that was always looking for efficient means of reaching customers. The traditional outdoor billboard, while still the economic foundation of the industry, has been augmented by an endless number of out-of-home advertising media. In fact, the term out-of-home advertising has replaced the more familiar outdoor advertising in recent years. Today, outdoor normally has a more narrow meaning, referring only to highway posters and large signs. (Russell and Lane, 1996)

Out-of-home medium comprises of a number of advertising vehicles with a common marketing objective that is all out-of-home advertising seeks to reach consumers who are in the marketplace, many with the intention to purchase. (Russell and Lane, 1996) *The four primary categories of out-of-home advertising media are billboards, street furniture, alternative media and transit.* (Outdoor Advertising Association of America, 2005) The text will first discuss outdoor advertising in general followed by other variations of out-of-home advertising media that have emerged including transit advertising.

2.13 Contemporary Advertising through the Outdoors:

Outdoor advertising has achieved great success as a national and global medium of communication. Today, outdoor advertising is being used for one single reason and that is, *"to communicate a succinct message or image in the local language to a mass audience quickly and frequently at the lowest cost per thousand of any major medium."* (Arens, 2004)

Outdoor is normally a secondary medium, especially for national advertisers. However, a number of local and national advertisers use outdoor as their primary advertising vehicle. Companies pursue outdoor advertising for a number of reasons. Advancements in outdoor imaging, color and the timely printing of boards also the fact that outdoor can generate tremendous reach and frequency levels at a fraction of the cost of traditional media are some of the reasons. (Russell and Lane, 1996)

Like other advertising media, outdoor is most successful when it is used in accordance with specific marketing objectives. In most cases, these objectives encompass one of the following advertising strategies: (Russell and Lane, 1996)

1. Companies are introducing a new product and want immediate brand name recognition to complement other forms of advertising.

2. Firms are marketing established, well-known, and recognized brands and want to provide reminder advertising to consumers in the marketplace.

Outdoor advertising can trace its lineage back to the earliest civilizations. While formats have certainly changed and as advertising ideas have evolved, outdoor is still here. The growth in outdoor advertising is expected to continue as advertisers see alternatives to the declining audiences and ad clutter of other mass media. "Now that TV viewers can choose from more than 50 channels or more, it has become increasingly difficult for advertisers to attract customers. But there is still one medium that can carry their message 24 hours a day, seven days a week, day and night without interruption. It is never turned off, zipped, zapped, put aside, or left unopened. For that reason, some experts refer to billboards as the last mass medium."(Arens, 2004)

Outdoor advertising is an effective and low-cost means of communication for businesses. With substantially longer commutes, traffic jams and more miles being driven by a record amount of vehicles, the audience for outdoor is growing at an extremely rapid pace. All the while, the competing media has become more and more fragmented by the addition of thousands of cable TV channels, Internet sites, magazines and newspaper publications, leaving outdoor as the one medium that can not be missed or diluted. The outdoor industry has enjoyed a recent boom in outdoor use as more businesses turn to outdoor advertising as their most cost-effective means of reaching their customers. Billboards are high-impact as well as low-cost and they convey the message whether it is day or night. (Russell and Lane, 1996)

2.14 History of Outdoor Advertising:

Outdoor advertising is the oldest form of promotion, dating to prehistoric times. It was probably the first advertising medium ever used. Evidence of outdoor messages can be found in prehistoric carvings on bronze and stone tablets in the Middle East. In Egypt, outdoor was a popular means of posting public notices as well as sales messages. (Russell and Lane, 1996) In the Middle Ages, bill posting was an accepted form of advertising in Europe and in the 19th century, it evolved into a serious art form."(Arens, 2004) Posting 'bills' on wooden boards in the late 19th century led to the birth of the term *"billboard,"* as we know it today. (Outdoor Advertising Association of America, 2005)

A billboard or hoarding is a large outdoor signboard, usually found in places with high traffic such as cities, roads, motorways, and highways. Billboards are aimed at passing pedestrians and drivers. The vast majority of the billboards are rented to advertisers rather than owned by them. (Wikipedia, 2006)

2.14.1 History Timeline:

Earlier billboards were basically large posters on the sides of buildings. As roads and highways multiplied, the billboard business thrived. Following is basically a timeline of the important events that hold significance for the U.S. billboard industry. (Wikipedia, 2006)

Table 8: Timeline

1795: Lithography was invented, making real posters possible
1835: Jared Bell was making 9x6 posters for the circus in the U.S.
1867: Earliest known billboard rentals
1872: International Bill Posters Association of North America was established (now known as the Outdoor Advertising Association of America) as a billboard lobbying group
1889: The world's first 24 sheet billboard was displayed at the Paris Exposition and later at the 1893 Columbian Exposition in Chicago. The format was quickly adopted for various types of advertising, especially for circuses, traveling shows, and movies
1907: The Model T automobile is introduced in the U.S., increasing the number of people using highways and therefore the reach of roadside billboards
1925: Burma-Shave makes its billboards lining the highways
1931: The Wall Drug billboards start to go up nationwide
1965: The Highway Beautification Act is passed after much campaigning by Lady Bird Johnson
1971: The Public Health Cigarette Smoking Act bans cigarette ads in television and radio, moving that business into billboards
1981: The Supreme Court overturns a San Diego billboard ban, but leaves room open for other cities to ban commercial billboards
1999: Tobacco advertising is no longer allowed on outdoor
2000: Athens clears billboards off rooftops in preparation for the 2004 Summer Olympics

Source: Wikipedia, 2006

2.15 Outdoor Advertising Formats:

Outdoor advertising offers extremely targeted messaging designed to capture consumer's attention, wherever they go. Combining traditional mass media with newer forms of outdoor media can make a tremendous impact improving reach, frequency and overall awareness. There are many types of outdoor advertising being done by companies around the world. But generally the major outdoor formats have been catergorized into four categeories. They are stated in the following table: (Outdoor Advertising Association of America, 2005)

Table 9: Outdoor Advertising Formats

Out-of-Home Media	
OUTDOOR	
1. **Billboard** • Bulletins • Spectacular displays • Wall murals • 30-sheet posters • Eight-sheet posters	2. **Street Furniture** • Bus shelters • Urban Panels • Kiosks • Convenience stores • Shopping malls
3. **Alternative Media** • Airborne • Blimps and Custom Inflatables • Carton and Cup Advertising • Confection Packaging • Digital Displays • Golf Cart Advertising • Marine Vessel Displays • Parking Garage Advertising: • Stadium and Arena Displays • Turnstile Advertising • Vending Cart Umbrellas	4. **Transit** • Buses • Airports • Subway and rail • Truck sides • Taxi displays

Source: Outdoor Advertising Association, 2005

2.15.1 Billboards; The Foundation of Outdoor Advertising:

Billboards are an important source for informing travelers, commuters and tourists. Billboards are often the last advertisement viewed before the point-of-purchase. They are the standardized large format advertising displays which people can see from a greater distance, generally more than 50 feet. They provide exposure 24 hours a day and seven days a week. Along with clutter free messages in a customized environment as well as desirable coverage to localities that are hard to reach by traditional media. Usually messages are displayed on: (Outdoor Advertising Association of America, 2005)

1. Bulletins
2. 30-sheet posters – poster panel-standard billboard
3. Eight-sheet posters
4. Vinyl wrapped posters
5. Spectaculars
6. Wall murals

2.15.1.1 Bulletins:

These structures are the largest and most prominent type of outdoor advertising. Bulletins measure 14 by 48 feet along with extensions. They can carry both painted and printed messages. Usually bulletins are created in a shop first than they are brought to the site, where they are assembled and hanged on the billboard structure. Painted bulletins are normally repainted

several times. Some bulletins are three-dimensional or embellished by extensions either cutout letters, backlighting, moving messages, electronic time and temperature units called jump clocks. Bulletins are very costly than posters but the cost can be reduced by rotating the same bulletins to different locations every 60 or 90 days. This gives the advertiser wider coverage at minimum cost. (Arens, 2004)

2.15.1.2   30-Sheet Posters:
The 30-sheet poster panel is considered the *standard billboard*. According to (Russell and Lane, 1996) *Bleed* and 30-sheet posters, which use the same frame, constitute the basic outdoor advertising billboard along with bulletins. A poster basically consists of blank panels with a standardized size and border. It is usually anchored in the ground but may be affixed to a wall or roof. Poster sizes are referred to in terms of sheets. The poster sheets are mounted on a board with a total surface of 12 by 25 feet. There are also ready made posters called *stock posters* available in any quantity and often feature work of great artists and lithographers. (Arens, 2004)

2.15.1.3   Eight-Sheet Posters:
These are small posters called *junior panels* as well since they are around 6 feet high and 12 feet wide. The best point about these panels is that they can reach pedestrians as well as drivers/passengers in concentrated urban areas. (Arens, 2004) The messages mounted on poster panels are printed using silk screen or lithography. Everything is done before hand only the completed panel is smoothed into position on the billboard. (Bovee and Thill, 1995)

2.15.1.4   Spectaculars:
As the name implies, outdoor spectaculars are large, usually unique displays designed for maximum attention in high traffic areas. They may consist of special lighting or other types of ingenious material and innovations. (Russell and Lane, 1996) According to William F. Arens, they are giant electronic signs that incorporate movement, color and flashy graphics to grab attention. These are very expensive to produce and are found primarily in the world's largest cities such as Tokyo, London, New York and Las Vegas etc. (Arens, 2004)

2.15.1.5   Wall Murals:
Wall murals are advertisements that are painted or pasted directly upon buildings. The advancements in technology have given wall murals a different image. Now instead of painting the whole wall, a computer generated image can be printed on vinyl sheet and pasted on building walls. Wall murals usually accommodate a wide variety of unusual creative sizes and shapes and have large scale, often several stories high. Wall murals provide good exposure and high visibility to vehicular and pedestrian traffic. The trend of vinyl- wrapping was only applicable to buses but now advertisers are

wrapping buildings and hotels. (Outdoor Advertising Association of America, 2005)

2.15.2 The Increasing Use of Street Furniture:

Street furniture advertising provides a last minute reminder for consumers' just moments before a potential purchase decision is made because many street furniture displays are located near shopping centers. Street furniture advertising is ideal for generating high awareness and brand recognition. Therefore this type of outdoor advertising is positioned in close proximity to pedestrians and shoppers for eye-level viewing. For example bus bench advertising, bus shelter panels, in-store displays and information kiosks etc. Following is a detailed list of some of them. (Outdoor Advertising Association of America, 2005)

2.15.2.1 Bus Shelter:

Bus shelters now have panels mounted in glass, backlit frames on both sides that offer uncluttered platform for advertising. Since a lot of people use public transportation on a day to day basis, these shelters provide 24-hour visibility to pedestrian traffic as well as vehicular traffic since they are positioned at high-circulation locations, usually along main roadways of metropolitan markets. Along with bus shelters, *bus bench advertising* is also becoming popular. If advertisers can not get hold of the bus shelter panels than bus benches is another option for them to display their message on. Bus bench advertising consists of four-color process silk-screened posters affixed to the backrest area of bus benches. The benches are usually located at bus stops within metropolitan areas at high traffic intersections. The benches can be used as a point-of-sale vehicle near supermarkets, malls, movie theaters, record stores, tourist attractions and so forth. (Outdoor Advertising Association of America, 2005)

2.15.2.2 Urban Panels:

Urban panels or sidewalk posters are basically the same thing as eight-sheet posters only; they are very small in size, since they can be mounted on sidewalks. Usually these urban panels are visible along subway stairwells. Sidewalk posters can attract both commuters and pedestrians since the ad is displayed on both sides of the panel. *Pedestrian panels* another version of urban panels are backlit, bus shelter-size showcases located on the inner perimeter of sidewalks. These are usually facing outward from parking lots which are located in high-density metropolitan areas. Even the beaches are used to target customers since many people like to go and sit by the sea and enjoy the sun during the summers. *Sun shelter displays* and *beach panels* are changing the scenery around most beaches. Sun shelter displays are framed advertising panels located on the side of protective sun shelter structures on beaches. Beach panels are framed poster displays on the back of lifeguard towers. Both these advertising mediums are targeting beach-goers, board walkers, bike riders, joggers, skaters and strollers. (Outdoor Advertising Association of America, 2005)

2.15.2.3 Kiosks:

Kiosks are basically free-standing information or public-service stalls such as newsstands or information booths found at shopping malls. Advertisements can be affixed to two backlit panels on each kiosk to target any customer who visits it. Then there are *telephone kiosks*. Many freestanding public telephones have panels that can have ads affixed on them. Even *newsstands and news rack displays* can have advertisements posted on them. Basically advertisements are displayed in the front of the newsstand kiosk and on the sides of the news racks that are found in densely populated city centers. *Bicycle racks* are also being used by advertisers to target specified audiences. Advertisements on posters are positioned on structures designed to shield "parked" bicycles against theft, vandalism and the elements. Strategically bicycle racks are placed in shopping centers and on college campuses at heavily used buildings such as libraries, sports facilities, student centers, classroom buildings and dormitories so they target a distinct set of customers. (Outdoor Advertising Association of America, 2005)

2.15.2.4 Convenience Stores:

Many chain and independent convenience stores have displays called two-sheets located at the entrance to greet customers just before they are about to make a purchase. Two-sheet posters are vertical but there are also *one-sheet posters* that can either be vertical or horizontal. They are framed displays posted at the front of stores, such as grocery and other retail outlets to provide point-of-purchase proximity and usually both types are posted inside the store. (Outdoor Advertising Association of America, 2005)

2.15.2.5 Shopping Malls:

Shopping mall displays are strategically located at entrances, escalators, food courts and other high-traffic areas. Many displays are two; three, or four-sided units that can contain store directories as well different advertisements and are backlit for added visibility. These displays can also be rotated to provide eye-catching movement. Shopping mall displays are actually targeting shoppers with spending on their minds so these ads are last minute reminders before shoppers make a purchase. (Outdoor Advertising Association of America, 2005)

2.15.3 Alternative Media; A New Wave in Outdoor Advertising:

Beyond billboards, a whole new field of advertising formats has emerged to impact consumers head-on during the course of daily activities. It is just about anything one can imagine. For example airborne displays i.e. aerial advertising, inflatables, digital displays, post card advertising and stadium and arena display etc. The alternative outdoor products have grown into a sophisticated and viable billion dollar business. Advertisers can use one specific form of alternative outdoor or use multiple forms. However the advertising is done, alternative outdoor media is a cost efficient means to promote a big brand with "round the

clock presence" on a local level. Following are some types of alternative media. (Outdoor Advertising Association of America, 2005)

2.15.3.1 Airborne:

Airborne displays are large advertisements printed on panels. These panels are available in various shapes and sizes and usually towed by aircraft over areas of concentrated population. When the aircraft flies by, the panel can be read by people on the ground. Also advertisers can get the plane to write their message in the sky through smoke emitted by the rear of the plane. This is known as skywriting. Sky writing needs to be done in the right area since it only lasts for a couple of hours, so the impact time is less hence it should reach large audiences at either at sports events, beaches, resorts or other high consumer areas. Airborne displays can be used to advertise products/services; introductions; retail or sports events, motion pictures, concerts, theme parks and so forth. (Outdoor Advertising Association of America, 2005)

2.15.3.2 Blimps and Custom Inflatables:

Airships or blimps are lighter-than-air craft that carry sponsor messages over major metropolitan areas. Inflatables are custom-designed shapes, usually taking the shape of a product or character in larger-than-life size. Some are affixed to bulletins, others are freestanding units placed at special events. Airships are usually part of a corporate image or public relations program to deliver advertising messages to millions at sports or other events. Inflatables are used to attract attention at events such as sports, concerts, exhibits, store openings and special sales. (Outdoor Advertising Association of America, 2005)

2.15.3.3 Carton and Cup Advertising:

Advertising on cups which are distributed by food outlets like delis, diners, restaurants and street vendors etc can be used by advertisers to convey their message to the consumer. The same goes for tops of pizza boxes that are distributed by pizzerias, advertisers can get the pizza company to display their advert on the top of each box. This type of advertising places the advertiser's message directly into the hands of consumers, who in turn become walking billboards for a product as they carry their cup or box with them from point of purchase throughout its use. (Outdoor Advertising Association of America, 2005)

2.15.3.4 Confection Packaging:

Advertising on individually wrapped after-dinner size confections is possible especially when they are distributed free in upscale restaurants, beauty salons and day spas. Each wrapper clearly conveys advertising messages on both sides. The ad-wrapped sweets can either be displayed at the point of purchase or offered to customers when they are paying their bill right after dinner. This is a good way to reach specific demographic markets, such as women in beauty salons and spas. (Outdoor Advertising Association of America, 2005)

2.15.3.5 Digital Displays:

Digital screens provide entertainment, news, weather, sports and advertising to consumers while they wait in line or in elevators, check-out counters, coffee shops, lobby shops, convenience stores, supermarkets, gas pumps and transit hubs. The screens can be updated instantly and can target desired demographic audiences. Advertisers use digital screens to build brand awareness and reinforce existing advertising campaigns. (Outdoor Advertising Association of America, 2005)

2.15.3.6 Stadium and Arena Displays:

Everyone has a love for sport be it cricket, football or hockey etc. All sports are played in arenas and stadiums and advertisers have found various ways to target the spectators sitting in the audience. Advertisements in arenas reach captive audience with guaranteed circulation, excellent visibility and the possibility of television exposure. Usually scoreboards, dashers and replay screen spots display advertisements. (Outdoor Advertising Association of America, 2005)

2.15.3.7 Turnstile Advertising:

Turnstile is basically a box with four illuminated posters on each side. These rotate 360° and are batter operated. They are located in arenas, stadiums, amusement parks, subways and airport terminals. These are used for point-of-sale and brand awareness and also as a promotional tool at events, exhibitions and trade shows. (Outdoor Advertising Association of America, 2005)

2.15.3.8 Vending Cart Umbrellas:

Advertising on the umbrellas of vending carts is another way to attract customers. Umbrellas are placed on carts on street corners in the most highly trafficked areas. (Outdoor Advertising Association of America, 2005)

These help target pedestrian and passengers/drivers who are passing by. The purpose is to attract customers to the new product being sold. Even table tops in restaurants and cafés are being used by advertisers to convey their message. Some cafés have sitting areas in front of their shop therefore they place tables with umbrellas in order to provide shelter to the customer, these umbrellas can also be a medium for advertisers to communicate their message. (Outdoor Advertising Association of America, 2005)

2.15.4 Transit Advertising; Reaching Consumers On-The-Go:

Transit advertising is when ads are displayed in such a way that they reach people traveling either by plane, train, automobile, bus and cab and on foot. In fact, given the nature of transit advertising, it is visible at all hours, with particular strength during rush hour. Using all types of transit advertising can make a tremendous impact improving: reach, frequency and overall impact. (Outdoor Advertising Association of America, 2005) For example ads displayed in airport terminals, on the exterior of buses and on taxi cabs reflect transit advertising. According to

J.Thomas Russell, W. Ronald Lane, and William F.Arens, advertising on transit shelters is a type of transit advertising whereas Outdoor Advertising Association of America, has mentioned bus shelter advertising as part of street furniture. But shelter advertising according to J.Thomas Russell and W. Ronald Lane is a major growth area and can be considered a separate media in the near future. (Russell and Lane, 1996) It has the advantage of being used in areas where zoning regulations ban outdoor. Following is the list of various types of transit advertising. (Outdoor Advertising Association of America, 2005)

2.15.4.1 Buses:
Exterior bus posters attract mass audience and hence a lot of exposure as buses travels franchised routes through markets. Since the bus follows the same routes frequency develops from repeated exposures. Than there are interior bus cards, which are positioned in frames above passenger seats. In some cases, a single advertiser can purchase all of the cards on a vehicle to create a *'branded bus,'* and even the exterior can be fully-wrapped with the same brand. The audience as obvious is the passenger i.e. the bus rider. (Outdoor Advertising Association of America, 2005)

2.15.4.2 Airports:
Airport advertising is available in a variety of formats. Interior displays can be freestanding or affixed to walls. They are located throughout the terminals in arrival and departure areas, ticketing areas, baggage claim, retail shops and VIP lounges etc. The majority of interior airport displays are backlit. Exterior displays are available along airport/terminal roadways as billboards, spectaculars or overhead signs. Following is a list of the interior displays. (Outdoor Advertising Association of America, 2005)

2.15.4.3 Subway and Rail:
Subways and rapid transit systems offer a variety of advertising venues. They include printed as well as backlit posters on platforms and walkways, entrance displays, station clocks, and special in-car arrays. These reach commuters and high frequency develops due to daily passenger use. (Outdoor Advertising Association of America, 2005)

2.15.4.4 Truck Sides:
Advertisers are taking advantage of the wide creative opportunities afforded by trucks to generate high-impact. Fleet advertising displays consist of specialized adhesive-backed sheet affixed to special frames on the sides and/or rear of trucks running regular routes in metropolitan areas and/or tractor trailers running interstate routes. Advertisers turn to truck side advertising to penetrate markets with restricted or limited outdoor advertising, as well as in saturated markets. Mobile billboard (truck-mounted) displays are poster panels affixed to vehicles. Specifically mobile units with electronic, 3D, or video screen displays are available for advertisers as well. Routes can

be set by advertisers from sellers offering computer-generated ZIP code or priority targeting. (Outdoor Advertising Association of America, 2005)

2.15.4.5 Taxi Displays:

Taxi advertising is a medium with superior levels of recall, reaching a local, business and tourist audience en route to and from airports, hotels, convention centers, sporting events, shopping centers and restaurants. Displays are printed on panels affixed either to the roof or trunk of urban taxicabs. Roof units display ads on both sides and are illuminated as well. Fully-wrapped taxis are becoming a popular media variation. Wrapped taxis use the same production techniques as fully-wrapped buses and they reach taxi riders, pedestrians and vehicular traffic in urban areas**.** (Outdoor Advertising Association of America, 2005)

2.15.4.6 Advantages and Limitations of Transit Advertising:

Transit advertising provides a number of advantages to advertisers and according to J. Thomas Russell and W. Ronald Lane, although it is still a small medium by total advertising standards but it has grown at a significant rate in the past several years. Besides advantages, limitations like poor public perception, limited selectivity and creative flexibility hinder the image of this particular media. (Russell and Lane, 1996)

2.15.4.6.1 Advantages:

2.15.4.6.1.1 Long Exposure:

It is believed that the average transit ride is around 25 minutes. (Arens, 2004) So as long as riders stand or sit in a bus or train they have the opportunity to see the advertisement inside the vehicle. If the trip is really long than the advertisement can be studied quite carefully and can eventually make an impact. (Bovee and Thill, 1995)

2.15.4.6.1.2 Repetitive Value:

Many people take the same routes day after day. (Arens, 2004) According to J. Thomas Russell and W. Ronald Lane, the repetitive nature of the transit audience therefore quickly builds high levels of frequency over relatively short periods. (Russell and Lane, 1996) People who follow the same route are exposed to the same ad day after day. This may lead to high frequency rates but *message wear out* is of big concern for advertisers, who need to change the transit ads more quickly since they are displayed for at least a month or even a year. (Bovee and Thill, 1995)

2.15.4.6.1.3 Low Cost:

William F. Arens, states that transit ads cost less than any other medium. (Arens, 2004) Courtland L. Bovee and John V. Thill, also agrees by stating that "transit advertising is one of the least expensive ways to reach

an audience. Not only is the cost per thousand low, but the production costs are low as well." (Bovee and Thill, 1995)

2.15.4.6.1.4   Creative Opportunities:
Transit advertising can be carried out with a lot of creative flare but the innovations are limited in transit advertising since ads are displayed on a flat surface. Special lighting and color effects are available at relatively low cost which can be used in various ways to attract attention. The lighting may give the poster a very different touch and make the message stand out more and be noticed not only by riders but also by passengers, drivers and pedestrians. (Arens, 2004)

2.15.4.6.1.5   Geographic Coverage:
Since Transit advertising is displayed on vehicles, on shelters and in terminals, therefore it can target a large number of people or even a specific audience comprising of a large number of people. According to Courtland L. Bovee and John V. Thill, with transit advertising, advertisers can blanket the entire city or reach just that area where target customers live or work. (Bovee and Thill, 1995)

2.15.4.6.2 Limitations:

2.15.4.6.2.1   Limited Selectivity:
The issue of limited selectivity is debatable since transit advertising does provide a vast geographic coverage. But advertisers have to keep in mind that since transit advertising is on the move and it may reach audiences that do not constitute the advertiser's target audience. According to Courtland L. Bovee and John V. Thill, mass transit serves a large and diverse population, so it is difficult to use transit advertising to pinpoint specific audience segments. (Bovee and Thill, 1995)

2.15.4.6.2.2   Status:
Transit lacks the status of the major advertising media like print and broadcast (Arens, 2004). Courtland L. Bovee and John V. Thill, states that people usually do not see it as a prestigious medium. Plus since it is being displayed in a crowded environment; rush-hour crowd as well as the vehicle itself, if dirty, may limit the opportunity of reading the ad carefully. (Bovee and Thill, 1995)

2.15.4.6.2.3   Limited Creative Flexibility:
Transit posters must be flat. They may feature eye-catching photography or graphics, but they are essentially a piece of cardboard or a transparency mounted in a frame. Unlike billboard ads, which can incorporate three-dimensional gadgets and other attention-getting elements, transit advertising lacks the innovative and creative touch. (Bovee and Thill,

1995) Copy is limited on transit advertising as well although they may carry longer messages than billboards. (Arens, 2004)

2.16 Outdoor Advertising Looks Better Than Ever:

New technology and new ideas are constantly improving the effectiveness and efficiency of outdoor advertising. As technological advances allow advertisers to better target consumers, messages will become more and more customized to individuals. The outdoor industry is dedicated to improving operations in the 21st century with a commitment and focus towards providing better quality, speed, reliability and service. (Outdoor Advertising Association of America, 2005)

There are three types of billboards in the market *traditional, mechanical, mobile* and *digital*. Traditional billboards as we already know are typically large signs advertising goods or services. As it has been discussed earlier in the literature, traditional billboards comprise of bulletins, sheets and posters etc. Mechanical billboards on the other hand are rotating and multi-message. These billboards show three separate adverts in rotation using a mechnanical system. They are thought to be more effective as the motion draws attention to the messages displayed. (Wikipedia, 2006)

Than there are mobile billboards that can be made mobile, either by mounting a traditional billboard onto a trailer or flatbet truck, or by covering an entire vehicle in a "wrap" image. Finally the new digital billboards, that allow animation and completely rotating advertisements.Even holographic billboards are in use in some places. Interaction is an emerging theme in electronic billboards. There are also upcoming billboard technologies that will synchronize with advertisements on radio stations. (Wikipedia, 2006)

Each time a new communications technology is developed; advertisers are quick to devise ways of exploiting the medium for advertising purposes. Advertisers move rapidly to exploit the commercial possibilities of technology advancements in traditional mediums like radio, television and outdoor etc. Sports arenas' and stadiums' electronic scoreboards carry product names in yards-high lettering. The developing technologies of tele-text, electronic mail and interactive cable television are now being used to sell products as well. The change in outdoor technology is also visible. Advertisers have now reverted back to outdoor to attract customers because of the following new technology that is making outdoor formats even more attractive. (Gottlieb, 1991)

2.16.1 Vinyl and Computerized Painting:

Vinyl and computerized painting were introduced to the outdoor marketplace in the late '70's and have since revolutionized the medium. Images printed on flexible vinyl give advertisers creative versatility, vibrant color, durability and precision image reproduction. Wrapping buildings and vehicles with brands is the new trend in outdoor advertising. This was not possible until now. Many advertisers are able to create awareness and long lasting image because of good quality outdoor advertising and all the credit goes to computerized painting and digital technology. (Outdoor Advertising Association of America, 2005)

2.16.2 Three Dimensional and Special Effect:

Special effects and 3-D billboards have captured the imagination of creative designers and the minds of advertisers. The creative genius behind billboard props comes from fine arts professionals, engineers, sculptors, and building experts who offer their expertise to advertisers. Three dimensional ads include motion, lights, and other dramatic effects. Since a lot of billboards are erupting in the metropolitan areas and most of them are placed right next to each other, this clutters the environment and the billboard is not able to make an impact. Three dimensional and special effect billboards have rescued advertisers from this dilemma and offer customers a fresh site for their sore eyes. (Outdoor Advertising Association of America, 2005)

2.16.3 Moveable Message Technology:

Usually traditional billboards advertise a single message; moveable message signs revolve to display three different images or messages on one sign structure. This technology is currently the trend and advertisers have placed moveable message technology on the side of trucks and vans, making it even more mobile. Advertisers can place more than one message through this technology and it will cost less and have more impact. Pedestrians, drivers and passengers will be attracted by such a site and would be able to grasp in the message more clearly. (Outdoor Advertising Association of America, 2005)

2.16.4 Backlighting:

Backlit billboards house light boxes or cabinets of florescent bulbs placed one foot apart to illuminate billboards from behind the image. The images are digitally printed on both sides of translucent flexible vinyl to bring depth, color and density to the night time images. This is ideal for advertisers who want to place their messages in areas where there are a lot of other structures. Since the billboard will be lighted, people would be able to see it more clearly at night. Hence the message can be conveyed 24 hours a day and seven day a week, non-stop. (Outdoor Advertising Association of America, 2005)

2.16.5 Digital and LED Technology:

Advertisers use digital technology on billboards for a number of creative effects. LED stands for light emitting diode which is a semi-conductor diode that emits light when a voltage is applied to it and that is used in an electronic display. The brightness level of an LED is measured in milli-candelas. The materials used to manufacture the LED determine the brightness of the LED. Now plasma screens and televisions are being used to display messages to consumer in un-conventional areas like airport terminals, arenas and stadiums etc. The digitization of technology has allowed posters to be computer printed than painted. Even the new media that is mentioned in this report is the result of digital technology. (U.S. Department of Transportation: Federal Highway Administration, 2006)

Section III: Research Methodology

3.1 Definition of Research:

The word research comes from the French 'rechercher,' meaning to search again or survey. It is defined as a careful, systematic, patient investigation undertaken to discover or establish facts and relationships. Research is, simply, the systematic search for pertinent information on a specific topic or problem. It starts with a problem, collects data or facts, analyzes these critically and reaches decisions based on actual evidence. It involves original work instead of mere exercise of personal opinion. (Malik, 1998)

3.2 Defining Research Methodology:

Basically, when a researcher uses certain tools to collect data, analyze them, test them for verification of the hypotheses and find results of the whole procedure, this process is called method of research. (Malik, 1998) According to Bindrawan Lal, research methodology is a method of studying problems whose solutions are to be desired partly or wholly from facts. These facts may be statements of opinions, historical facts, those contained in records and reports, the results of tests, answers to questionnaires, experimental data of any sort and so forth. Following is the general research process that starts from the identification of the problems and the sources and then moves to identify the sample, collect the data and analyzing it. (Lal, 2002)

Figure 21: The General Research Process:
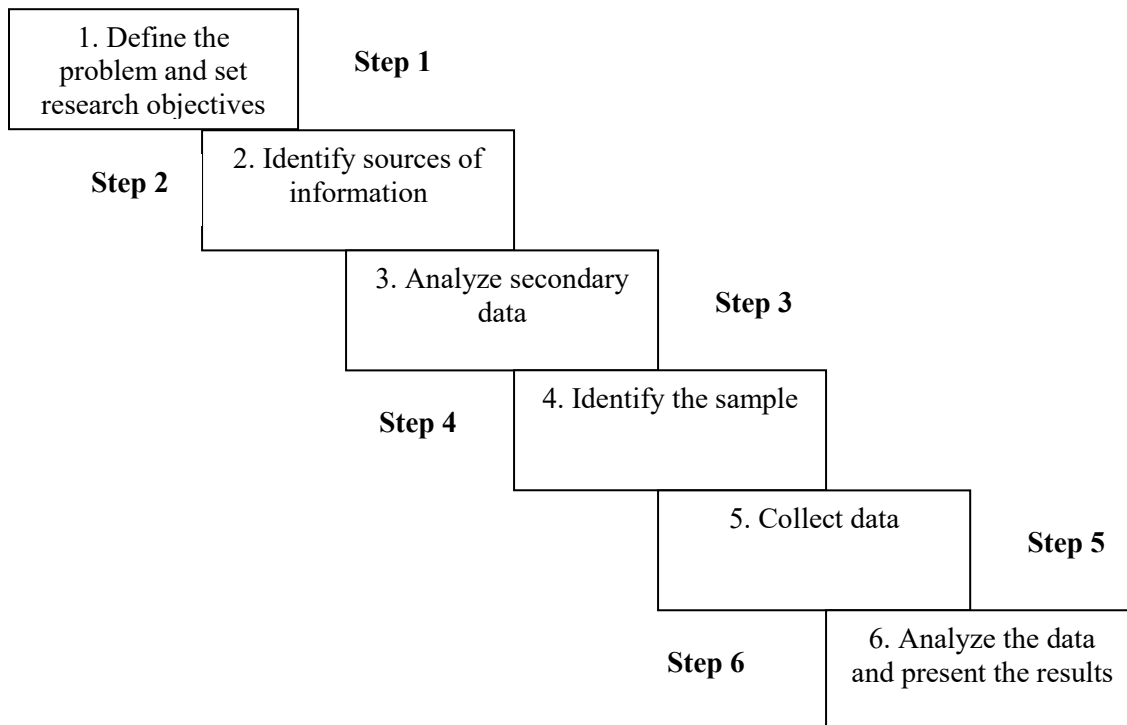
Source: Bovee and Thill, 1995, pg 144

3.3 Objective of the Research:

The major objectives of this dissertation are to study:

- ✓ To determine the status of outdoor advertising as an alternative to other mediums like TV or newspapers
- ✓ To determine whether outdoor advertising is making an impact on consumers and do they remember the advertising campaigns displayed by various companies.
- ✓ To find out the what consumers think about outdoor advertising and the surroundings
- ✓ To explore what consumers like to see on billboards or what catches their attention
- ✓ To find out the perception of consumers about the mobile companies and their outdoor advertising campaigns
- ✓ To explore how billboard advertising can help consumer make the final purchase

3.4 Determining the Research Level:

There are three possible research levels: *exploratory, descriptive or causal*. The differentiation is necessary because each level requires varying commitments of time and funding. (Kotabe, 2001)

3.4.1   Exploratory Research:

This research is more appropriate when the primary objective is to identify problems, to define problems more precisely, or to investigate the possibility of new, alternative courses of action. Exploratory research can also aid in formulating hypotheses regarding potential problems or opportunities that are present in the decision situation. *This research is usually undertaken when there is not enough information available about the research subject*. In certain cases it is undertaken in order to provide a basis for further research, for example to define certain concepts or to formulate hypotheses. Exploratory research is often characterized by the need for great *flexibility* and *versatility*. The emphasis is on qualitative rather than quantitative data collection and several interviews may be sufficient means of information as this research relies on quick rather than slow answers. (Kotabe, 2001)

3.4.2   Descriptive Research:

This type of research provides information abut existing market phenomena. For example, market characteristics such as the socio-economic position of customers or their purchasing intent may be analyzed. Descriptive studies often require large quantities of data because the requirements for an accurate portrayal of the population under study are much more stringent. The intent of descriptive research is to maximize accuracy and to minimize systematic error. This form of research is quite common, in most cases as a preliminary study or an explanatory study, but also as an independent investigation. It aims to describe social systems, relations or social events and providing background information about the issue in question. (Kotabe, 2001)

3.4.3 Causal Research:

This research identifies precise cause and effect relationships present in the market. The level of precision is higher than that for other types of research because reasonably unambiguous conclusions regarding causality must be presented. This research type is most demanding in terms of time and money. It intends to present answers for why things happen and to highlight details of the relationship among variables. Causal research is useful only if the research objective is to identify interrelationships and if this knowledge makes a sufficient contribution to the decision process. (Kotabe, 2001)

➢ *The Chosen Research Level:*
After looking at the three basic research levels mentioned above, the appropriate research level for this dissertation is **exploratory research***, the reason being that this approach can formulate problems more precisely and gather more insight into the problem. This type of research can be performed using literature review and conducting surveys of people about their opinion. The characteristic of flexibility give this research the advantage to gather data from different sources and even the research approach can be both qualitative and quantitative.*

3.5 Conducting Research:
3.5.1 Step 1: Define the Problem
In many research projects, the problem to be investigated is quite clear. In other cases, though, the problem is difficult to interpret. (Bovee and Thill, 1995) This is the most important stage of all the research steps, and the one at which the research is most likely to be misdirected. (Kotabe, 2001) The title of a thesis or report names the topic or particular area to be investigated. It gives a good indication of what the study is all about. Statement of the problem serves an introduction to the paper as it must be stated clearly and concisely in order to remind the researcher at all the stages of research what the general issue is that the study will address. *Though the research problem i.e. the research topic* is stated first, the researcher is likely to return it to once the analyses have been written to make some changes in it. The problem can be stated in many ways like: (Malik, 1998)

1. A question or questions
    a. A single question
    b. Several questions
    c. A single question following several sub-sections
2. Declarative statement
    a. A single statement
    b. A single statement containing several phases
    c. A series of complete statements
    d. A general statement followed by subordinate statements
3. Statement followed by a restatement in the form of a question
4. A statement followed by a series of theses

➢ *Following is the chosen topic of this dissertation:*
   "Taking the Media Wars Outside: A look at Intense Outdoor Advertising in Pakistan
   Telecom Industry"

3.5.1.1 Hypothesis Development:

A hypothesis is a statement temporarily accepted as true in the light of what is, at the time, known about a phenomenon, and it is employed as a basis for action in the search for new truth. (Malik, 1998) The hypothesis should be a simple statement of what is expected to be true, or what one expects to learn, about the particular phenomena being studied. That is, the hypothesis is the prediction about what the experiment will result in. In this sense, a hypothesis contains a possible solution to the research problem or research topic and is expected to be verified or falsified by the evidence gathered by the study. (Wikipedia, 2006)

Hypothesis can be in any form except in the form of a question. They are generally translations of the research questions and can be generated in many ways. They can be developed for instance through existing theories, they can be based on social policy, research findings of other studies or from the intuition or findings from exploratory studies especially designed for this purpose. (Wikipedia, 2006)

For this research paper three hypotheses have been formulated, which would provide a clear framework and a guide when collecting, analyzing and interpreting data.

➢ **H1:** *Outdoor advertising is an effective compliment to other advertising mediums.*

➢ **H2:** *Outdoor advertising is not a structured medium in Pakistan, yet.*

➢ **H3:** *Outdoor advertising is playing an important role in the awareness of the product and brand.*

3.5.2 Step 2: Identify Sources of Information

The next step is to identify the sources of information. Usually they are either primary or secondary sources. Primary data yields from *qualitative or quantitative techniques* that are used to collect data directly from respondents. (Bovee and Thill, 1995)

Data are basic facts, figures and ideas, when they are organized and analyzed in meaningful ways, they yield information. Data being gather first hand for a specific purpose are considered *primary data*, which can be collected by conducting interviews, surveys and observations. Primary data can be expensive and time consuming to collect, but primary research is often the only way to successfully answer specific questions. Following are the qualitative techniques like in-depth interviews, focus groups and observations and the quantitative techniques are surveys and experiments that help generate primary data. (Bovee and Thill, 1995)

3.5.2.1 Qualitative Techniques:
3.5.2.1.1 In-dept Interviews:
The in-dept interview, or simply interview, consists of a researcher posing questions to individuals from the sample, one at a time, in interviews that may last as long as several hours. The point of in-depth interviewing is not to have people answer lots of yes/no questions but to get them to open up and discuss their attitudes and opinions. This technique requires a great deal of skill on the interviewer's part, in terms of both conducting the interview and interpreting the results. (Bovee and Thill, 1995) The interview is a data gathering device which, from one point of view, may be considered an oral type of questionnaire in which the research worker gets the needed information from the subject face-to-face. (Malik, 1998)

3.5.2.1.2 Focus Groups:
In focus groups a selected, relatively homogenous group of 6-10 participants is encouraged to discuss the topics that the researchers are investigating. The goal of a focus group is for the participants to develop their own ideas in an unstructured fashion, interacting with and stimulating others. The whole session is usually captured on tape or video for later in-depth analysis. This often allows insights that are hidden by the preconceived questions posed in conventional surveys. (Kotabe, 2001) According to Courtland L. Bovee and John V. Thill, the focus group is much like an interview in that the emphasis is on probing questions and thoughtful, reflective answers; the difference is that the interview takes place with a group of respondents from the sample. (Bovee and Thill, 1995)

3.5.2.1.3 Observations:
There are instances when the researcher has to employ observation as a technique of gathering data. Usually, such instances come when certain data cannot be secured adequately or validly through the use of the questionnaire or some other techniques. (Malik, 1998) According to Massaki Kotabe, observation involves watching participants as they undertake some activity simply to see what happens. The pattern of customer flow in a supermarket is best determined by simply watching it. (Kotabe, 2001)

3.5.2.2 Quantitative Techniques:
3.5.2.2.1 Surveys:
A survey is a method of gathering data directly from members of a sample. Surveys can be conducted through the mail, over the phone, in person and on computer. Regardless of the form, surveys involved some sort of *questionnaire*, a document listing questions that respondents read and answer, a list of questions that telephone or in-person interviewers read to respondents, or a computer program that presents questions to someone sitting at the keyboard. Surveys provide a quick, inexpensive, efficient, and accurate means of accessing information about a population. The growth of survey research is related to the simple idea that to find out what consumers think, one should ask them. (Bovee and Thill, 1995)

3.5.2.2.2 Experiments:
In experiments, participants are exposed to different treatments. It may range from testing new products to viewing commercials and measuring responses to them. In theory this approach may be used to establish causal relationships. In practice it is more frequently used to select the best alternative from a range of products. The basis of much experimental research is a comparison between groups. In a before-and-after setting, which is the most customary approach, the subject is tested prior to and after exposure to a stimulus. (Kotabe, 2001) According to Courtland L. Bovee and John V. Thill, an advertising experiment follows the same pattern as any scientific experiment: testing a hypothesis by controlling key variables. (Bovee and Thill, 1995)

➢ *The Selected Primary Source:*
   The primary source for this research paper would be one of the qualitative techniques and they are **surveys***. The tool of research would be a questionnaire, which will be distributed among 50 respondents located in the Rawalpindi and Islamabad area.*

3.5.3 Step 3: Analyzing Secondary Sources
In contrast to primary data, data already collected for an earlier purpose and reused for a new research problem are known as *secondary data*. Each category of data has its benefits and limitations. The biggest limitations of primary data are the costs and the time needed to collect and process the data. Secondary data usually costs less than primary data and can often be accessed more quickly. Secondary data are available to everyone where primary data is collected by the researcher himself. Moreover, secondary data may not answer the research questions, the data may not be accurate or to old to analyze. (Strauss and Frost, 2003)

The secondary data can be obtained from a variety of sources. A few of these include:
   ➢ Government sources
   ➢ Television and Radio
   ➢ Internet

3.5.3.1 Books, Magazines, Newspapers and General Business Publications:
These are excellent inexpensive sources of information about the past, present and future. Book, magazines and newspaper provide variety of information regarding any topic of inquiry. These can be easily found in any library and often are considered the standard secondary data sources. Excellent sources of information about products and companies are general business publications such as Business Week, Fortune, Forbes, and The Wall Street Journal. There are special magazines dedicated to the telecom industry and information technology that help in understanding the cellular companies. (Lehman and Winer, 2002)

➢ *Many books have been used to develop the literature review of this dissertation, mostly ranging around topics like Marketing, Advertising and Research Methods. The main marketing and advertising magazine that is Aurora will be used to study the various brands in the cellular industry. Newspapers will help in providing information about the billboard industry and the telecom industry as well. Looking at*

the magazines and newspaper will give further insight into the Pakistani advertising environment.

3.5.3.2 Government Sources:

Governments collect considerable amount of information about industries. Since the data is used to determine the status of the country, it is very much accurate and reliable. Many governments have their own surveys and research department that carry out research on a periodic basis. So much of the information is up to date. (Lehman and Winer, 2002)

➤ *The Government of Pakistan annually publishes 'Economic Survey,' which provides helpful facts and figures on the overall economic condition and state of the industry. Plus many other Ministries conduct research and present it to the government. Most of this information is available in libraries and can be accessed by anyone.*

3.5.3.3 Internet, Television and Radio:

Internet is a good source of secondary information but there are issues of data authenticity as well as other information quality issues. On the whole, today much of the information is available through the World Wide Web. A convenient way to search through the Web is with a search engine such as Yahoo!, Google, Excite or Lycos, just type in the keyword and thousands of WebPages will be displayed on screen. The electronic media is another way to gather information especially about products and services. Since many companies have advertisement running on each channel, it is a good way to stay abreast with the latest products or services in the market. Radio is a cheaper medium than television, and can help advertisers target the customer on his way to work or shopping. (Lehman and Winer, 2002)

➤ *Internet and other electronic media will be used as a source to compare the advertisements being given by the different cellular companies. The adverts and other promotional material aired on electronic media by the company will help in conducting its positioning and targeting analysis and compare the content of electronic and outdoor campaign.*

3.5.4 Step 4: Identify the Sample
3.5.4.1 Sampling:

When the research plans call for primary data, the first thing to do is choose the people who will participate. For research purposes, the entire group the researcher wants to learn more about is called the population or universe. If a researcher asks questions of every person in the research population, the researcher would be conducting a census. However, researchers rarely use the entire population; doing so would be quite expensive and time consuming in most cases. Besides, acceptably precise results can usually be obtained by questioning only a part of the population, called a sample. The people who participate as part of a sample are usually referred to as subjects or respondents. There are two way to draws sampling either using probability sampling methods or non-probability sampling methods. (Bovee and Thill, 1995)

3.5.4.1.1 Probability Sampling:

A probability sampling method is any method of sampling that utilizes some form of *random selection*. In order to have a random selection method, there must be some process or procedure that assures that the different units in the population have equal probabilities of being chosen. Humans have long practiced various forms of random selection, such as picking a name out of a hat, or choosing the short straw. These days, computers are used as a mechanism for generating random numbers. The simplest form of random sampling is called **simple random sampling**, where a sample is selected and any sample has an equal chance of being selected from the whole population. **Stratified Random Sampling**, also sometimes called *proportional* or *quota* random sampling, involves dividing your population into homogeneous subgroups and then taking a simple random sample in each subgroup. There is cluster and stratified random sampling but they are more technical and complicated compared to other methods. (Lal, 2002)

3.5.4.1.2 Non-Probability Sampling:

Non-probability sampling does not involve *random* selection. With non-probability samples, population may or may not be well represented. Non-probability sampling methods are divided into two broad types: *accidental* or *purposive*. Most sampling methods are purposive in nature because the problem is usually approached with a specific plan in mind. The most important distinctions among these types of sampling methods are the ones between the different types of purposive sampling approaches. (Lal, 2002)

3.5.4.1.2.1 Accidental Sampling

Representation of the population is not an issue in this sampling. It is also known as convenience, chunk, grab or haphazard sampling. When this sampling technique is employed, all units for study that the researcher accidentally comes in contact with during a certain period of time are considered. (Lal, 2002)

3.5.4.1.2.2 Purposive Sampling

Purposive samples are generated when the selection of units is made by the researcher using his or her own judgment. The selection may be made on the basis of contacting those units that are easiest to access, those that are deemed to be the most important, those that reflect a variety or extremes, or those that are typical. (Lal, 2002)

➢ *The sample size for this research is 50. People ranging between the ages of 20 to 40 would be asked questions about outdoor advertising. Both males and females will be part of the sample. The sample would constitute of people residing in Rawalpindi and Islamabad region. This sample has been selected in order to find the views of both youngsters and adults. Purposive sampling that is part of non-probability sampling has been employed to select the particular sample.*

3.5.5 Step 5: Collect Data
3.5.5.1 Data Collection Techniques:
There are a number of tools or techniques that are used for the collection of data in certain research. Some of the more important ones are stated in Figure 22 and some of them have already been discussed in step two of the research process. *For this study the questionnaire will be the basic tool of research.* The questionnaire design will be discussed in this step as well. (Malik, 1998)

To carry out any of the types of research investigation, the researcher selects the most appropriate instruments and procedures that provide the collection and analysis of data upon which hypothesis may be tested. The data gathering devices that have proven useful may be seen from the following Figure. (Malik, 1998)

Figure 22: Tools of Research
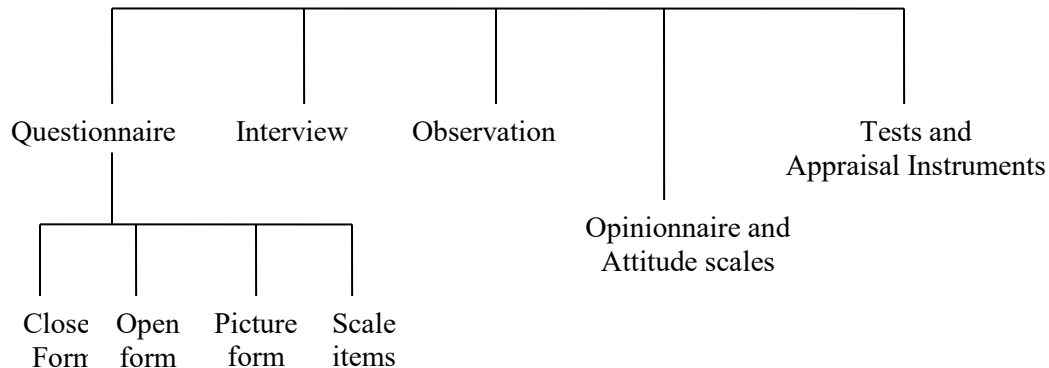
Source: Malik, 1998, pg 159

3.5.5.2 Questionnaire:
The questionnaire has been defined as 'a list of planned, written questions related to a particular topic, with space provided for indicating the response to each question, intended for submission to a number of persons for reply. The questionnaire is usually sent by mail to individuals who are called respondents in research terminology, but it can be administered by the researcher to groups of individuals. A questionnaire can be either structured or unstructured. The structured questionnaire asks a question and provides several possible answers. From the several answers provided, the respondent is asked to select the most appropriate answer. The unstructured questionnaire, on the other hand, primarily asks questions, but no suggested answers are given by the investigators. The unstructured questionnaire provides more liberty to the respondents but is more difficult to analyze when large groups of subjects are used. However, it is stated that the decision as to which type of questionnaire to use is based on the problem being studied and other practical factors. (Malik, 1998)

3.5.5.3 Questionnaire Design:
Questionnaires are an inexpensive way to gather data from a potentially large number of respondents. Often they are the only feasible way to reach a number of reviewers large enough to allow statistical analysis of the results. It is important to remember that a

questionnaire should be viewed as a multi-stage process beginning with definition of the aspects to be examined and ending with interpretation of the results. Every step needs to be designed carefully because the final results are only as good as the weakest link in the questionnaire process. Although questionnaires may be cheap to administer compared to other data collection methods, they are every bit as expensive in terms of design time and interpretation. (Lal, 2002)

3.5.5.4 Classification of Questionnaire:

There are various ways the questionnaire could be classified either in 'yes' or 'no' form or it could be open ended or close ended or a scale could be used like Likert or Bogardus scale. (Malik, 1998)

Table 10: Types of Questions in a Questionnaire

Yes or No Type	This consists of number of questions that could be answered by either yes or no.
Recognition Type	The respondent checks or underlies the best answer.
Coding Type	This pertains to the assigning of numbers to names, answers to questions and other data or items. The advantage of this type is that it will enable the researcher to use statistical accounting in handling qualitative data.
Completion Type	This consists of fill in the blank or blanks provided for the answer or answers after every question asked for.
Subjective Type	In this type the respondent is asked to give his opinions about certain events or happenings. An extended answer is usually required.
Combination Type	This is a combination of different types of questions (yes or no, completion, subjective etc) in a questionnaire.

Source: Malik, 1998, pg 162

According to Tariq H. Malik, questionnaires can be classified into two kinds: one is closed form and the other open form. The restricted or closed-form type of questionnaire calls for short, check responses. It provides for making a yes or no, a short response, or checking an item from a list of suggested responses. Some advantages of the closed-type from of questionnaire are: it is easy to fill out; it takes little time; it keeps the respondent on the subject; it is relatively objective; and it is fairly easy to tabulate and analyze. The open-form or unrestricted type of questionnaire calls for a free response in the respondent's own words. (Malik, 1998)

3.5.6 Step 6: Analyze Data and Present Results

Data collected form the sample is rarely in useful form. To draw all the research insights, the data must be processed, analyzed and interpreted. These processes are as varied as the types of data themselves, but they all attempt to covert raw data into useful information. As you might expect, computer often play an important role in this step, sorting and tabulating data from surveys and performing other computerized tasks that remove some of the burden from researchers. Sometimes, simply compiling the data, perhaps showing totals other times, researchers rely on sophisticated mathematical techniques and models to search for meaningful relationships in the data. (Bovee and Thill, 1995)

Finally, the way the research results are presented can be as important as all the other steps in the research process. The people doing the research and the people making the advertising decisions often have backgrounds and professional vocabularies that differ. Many aspects of marketing and advertising research are extremely complex and technical, and the advertisers that pay for research rarely have the detailed knowledge that researchers have. So research reports should avoid jargon and complex statistical calculations as much as possible and researchers should provide concise, logical recommendations. (Bovee and Thill, 1995)

> *The data from the questionnaire will be presented in tabulated form along with some graphical representation. All the graphs and charts will be made using Microsoft Excel. The findings will be further analyzed and included in the findings and analysis chapter of this research.*

3.6 Methodology of this Research:

We all know that methodology is a model, which provides guidelines about how research will be done in context of a particular topic. It consists of everything done from the beginning till the end of the research. Methods are a part of methodology, it refers to tools or instruments used to gather and analyze data. The methodology that has been adopted for the completion of this thesis is as follows:

- Firstly, the **type of research** carried out in this study is exploratory research Firstly, the research will look at advertising, then outdoor advertising and finally once the literature review is covered, analyses will be done keeping in perspective the cellular companies.

- The **type of data** collected for this project would be quantitative data. As questionnaires distributed to respondents would consist of qualitative statements, but assigning statements numerical values would change their interpretation. Hence qualitative data would be interpreted quantitatively or in more comprehensive words the data collected during the study will primarily be *qualitative* whereas the analysis will have a certain *quantitative* aspect.

- The **data sources** used for this project would be primary as well as secondary data sources. Primary data would be collected through disseminating questionnaires and secondary data would be collected from articles, books, journal articles, reports published by agencies i.e. government and non-government and published research thesis of students. The literature review would be done by studying the secondary sources.

- In this project the respondents would be judged on demographic and cognitive characteristics. The demographic variables would determine the target market of this research in terms of age, sex, marital status, education etc. The cognitive characteristics would give information about their opinions and attitudes towards outdoor advertising in the telecom industry that would help formulate their idea about

brand awareness, recall and recognition with respect to telecom brands like Telenor, Mobilink, Al-Warid and Ufone etc.

- ***Direct measurement*** will be adopted for taking the demographics into account, as respondents will be directly asked about these. The methods used for measuring respondents' perception would fall under *derived measurement*. The scale that will be employed for this purpose is the Likert scale. Likert scale is basically a technique that presents a set of attitudes as statements. In the questionnaire the attitudes would be named items. There is a five point likert scale and a three point likert scale. In the questionnaire a five point likert scale would be used. Respondents will place their choice against an item whether they agree or disagree to the statement. The five points are assigned values they are as follows: Highly agree-5, Agree-4, Do not know-3, Disagree-2, highly disagree-1.

- The basic aim of any research is to collect useful information from the relevant group of people. So the sample chosen to respond to questions must be representative of the population. Thus the population in this particular research would constitute of all individuals who have seen outdoor advertisements in the Rawalpindi region. The population would consist of infinite number of users. Therefore a sample of 50 respondents would be selected from the Rawalpindi and Islamabad region.

- The type of sampling used for this study is *(non-probability)* ***purposive sampling*** and the ***sample size*** is 50.

- There will basically be only one questionnaire, which will first cover the demographics of the respondent (these questions will help in determining the target market by taking into account different characteristics such as age, income level, education etc). The questionnaire then moves on to other questions and the likert scale, for each item stated in the scale, respondent has to say either highly agree, agree, don't know, disagree or highly disagree. The questionnaire will have a combination of both open-ended and close-ended questions.

- After all the information is collected from questionnaires which will be disseminated to the specified samples, then data will be translated to charts and graphs and further analyzed to draw conclusions. The research will draw conclusions after analysis and findings are presented.

3.7 Limitations of this Research:
The limitations of the study will be time constraints and the limited exposure to the infinite number of people located in the Rawalpindi and Islamabad region. Furthermore as a student there will be difficulty in gathering data from a huge number of respondents. Also since each respondent has a different point of view, this might complicate the process of making generalizations regarding the effectiveness of outdoor advertising in telecom sector.

Figure 23: Overview of Research Methodology

Research Level/Type of Research: Exploratory Research

Research Topic: "Taking the Media Wars Outside: A look at Intense Outdoor Advertising in Pakistan Telecom Industry"

Hypotheses:
- **H1:** Outdoor advertising is an effective complement to other advertising mediums.
- **H2:** Outdoor advertising is not a structured medium in Pakistan, yet.
- **H3:** Outdoor advertising is playing an important role in the awareness of the product and brand.

Primary Source: Qualitative Technique-survey

Secondary Source: Books, magazines, newspapers, government reports, internet and television

Sampling Type: Non-probability sampling- purposive sampling

Sampling Size: 50 respondents

Tool of Research: Questionnaires-response format: closed-ended, open-ended and likert scale
　　　Direct measurement- demographics of respondents
　　　Derived measurement-Likert scale
Analyze Data: Bar-charts and Pie charts

Section IV: Findings and Analysis

4.1 Survey Findings and Interpretation:

The topic of research is to find out about the status of outdoor advertising being done by cellular companies. Although, there is not much of literature available on the Pakistan outdoor advertising industry but its impact and value can be determined by asking consumers about advertisements being displayed in the outdoor by various companies. This chapter will analyze the questionnaire that was disseminated among respondents within the Rawalpindi and Islamabad region. The questionnaire comprises of questions about demographics, and about the advertising campaigns of telecom companies. A likert scale has also been used to gather consumer responses about outdoor advertising in general. (See exhibit # 12 in appendix for a copy of the questionnaire)

4.2 Demographics of Respondents:

Since demographics play a vital role in research and are critical in determining the accuracy of results, respondents were asked to state their age, gender and qualifications. The sample size chosen for this survey was 50, mostly people falling between the ages of 20 to 50. Both males and females took part in the survey and most of them have done their 'Masters.' Following are the results of the first part of the questionnaire.

1. **Age Group of the Respondents:**

Below 25	17	34%
25 to 35	18	36%
36 to 45	12	24%
46 and above	3	6%
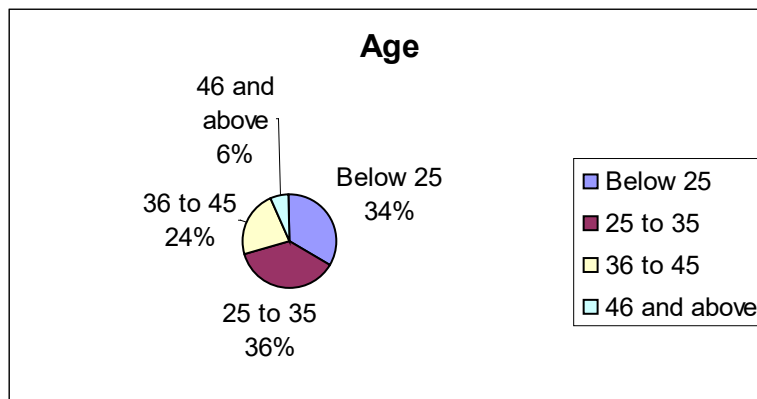
Consumer wants and abilities change with age. Therefore it is very important to keep in mind the age group, a company's target audience belongs to. Most of the respondents for this survey were below and above the age of 25. Around 18 respondents were between 25 to 35 years old and 12 respondents were in the age bracket of 36 to 45. In order to guarantee accurate results, the survey was given to people of different age groups, since everyone is being targeting by Telecom companies through one package or the other.

2. Gender of the Respondents:

Male	26	52%
Female	24	48%

Gender

Female 48%   Male 52%
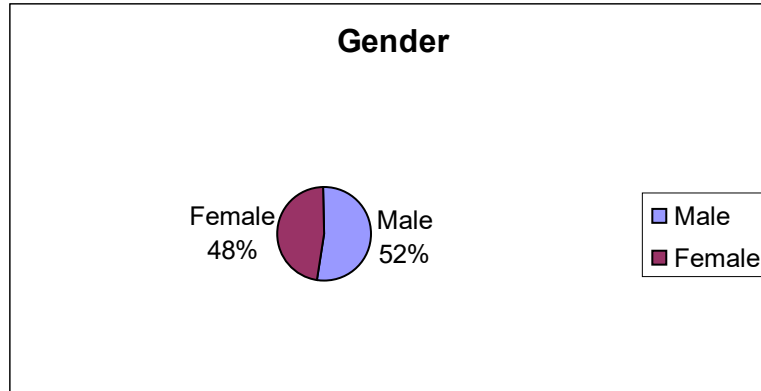
Male
Female

In order to generate response and maintain balance, an equal number of male and female respondents were handed over the questionnaire. Total of 24 females responded back, whereas the majority were males, leading to 26 in total. This was done keeping in mind that both men and women drive and are sometimes either passengers or drivers and both have an equal amount of decision making power when buying cellular connection.

3. Qualification Level of the Respondents:

Matric	6	12%
Intermediate	10	20%
Graduation	21	42%
Masters and above	13	26%

Qualification

Masters and above 26%   Matric 12%

Intermediate 20%

Graduation 42%

Matric
Intermediate
Graduation
Masters and above
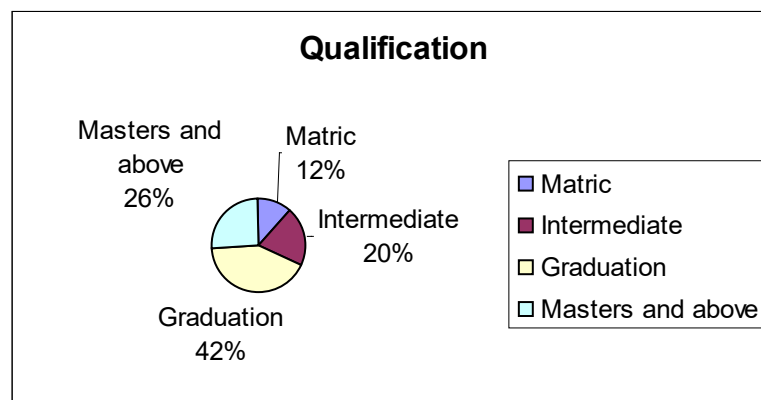
Majority of the respondents are graduates, whereas only 13 have acquired a master's degree. This shows that most of the respondents are well educated individuals who would be clearly able to interpret a billboard's message be it in Urdu or English. Around six respondents have done their matriculation and the rest have passed intermediate.

4.3 Questions about Outdoor Advertising Campaign and Cellular Companies:

Companies hope to target their consumers where ever they go. Billboards are one medium through which companies are able to achieve this mission. No matter what age group, a company's target audience belongs to; billboards will deliver the message to each and every one of them. Many cellular companies have realized the importance of outdoor advertising and are taking advantage of the medium. Mobilink, Ufone, Telenor and Warid are placing their billboards in every nook and corner of the city. They are either introducing a new package/service and want immediate brand name recognition or are advertising well-known and recognized packages to remind consumers. Following questions asks respondents about the type of outdoor advertising mobiles companies are doing; along with the some questions about the advertisements they display on billboards.

4. Generally, what type of outdoor advertising, do you think cellular companies are doing the most?

Billboard advertising	45	90%
Bus advertising	1	2%
Taxi displays	1	2%
Bus shelters	1	2%
Airport terminals	2	4%
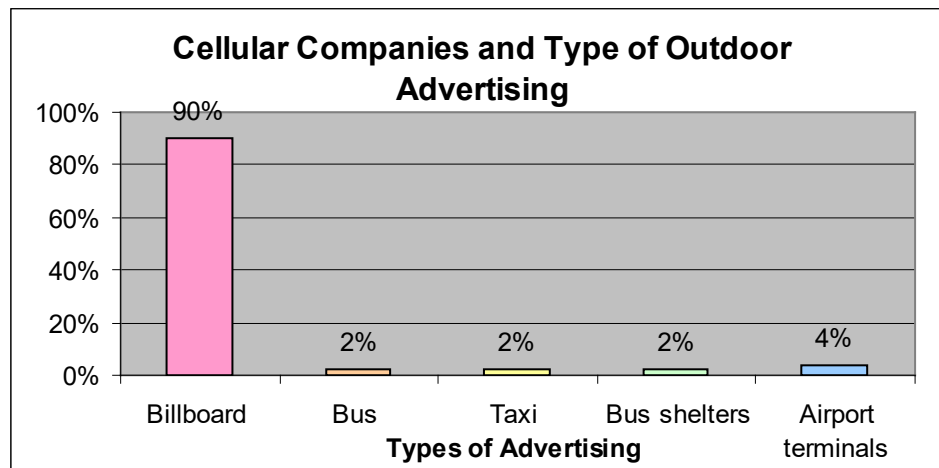
Billboards are the main source for informing travelers and commuters. They provide exposure 24 hours a day, seven days a week and can be viewed from a greater distance. Majority of the respondents believe that billboards are the only medium that they see along highways and at major traffic lights. Cellular companies are using billboards as their main medium of communication, and around 45 respondents believe this is true. There is so much competition in the cellular industry that almost every company is advertising in the great outdoors. New advertisements that run on the electronic and print media are immediately placed on billboards as well. Bus, taxi, shelter and terminal advertising are not popular in Rawalpindi and Islamabad; therefore cellular companies refrain from using such mediums.

5. Which cellular companies' advertisements on billboards, are you aware off?

Mobilink	34	68%
Ufone	22	44%
Telenor	36	72%
Al-Warid	10	20%
Instaphone	1	2%
Paktel	12	24%

Cellular Compamies that are Advertising in the Outdoor
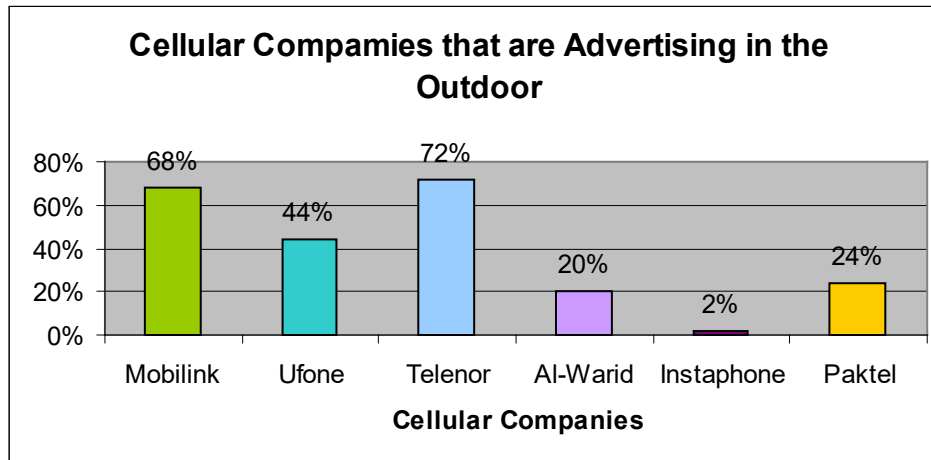
Telenor ranks high in this question, it secured the maximum number of responses. Respondents believe they have seen Telenor, Mobilink, Ufone, Warid and Paktel's advertisements on billboards. Telenor has recently started to extensively advertise on billboards with the launch of Djuice, Smart Call and Talkshawk. Mobilink also advertises its old and new packages; Indigo, Jazz and Ladies First. Currently following campaigns are on display: Mobilink's Ladies First, Telenor's Talkshawk and Smart Call, Ufone's Pre-pay, Warid's Zem Prepaid and Paktel's Talk free package. Instaphone currently does not have any advertisements displayed on billboards.

Telenor and Mobilink are attracting audiences by placing celebrities in their advertisements. Currently Ali Zafar (singer) and Sonia Jehan (actress) are gracing the billboards of Telenor Talkshawk. Marina Khan (actress/director) and Mehreen Raheel (actress/model) can be seen endorsing Telenor Smart Call. Mobilink has also showed competitiveness by placing models like Iman Ali (model/actress), Sophia Mirza (model/actress) and Zara Sheikh (model/actress), in Jazz advertisements, with Iman Ali being the current Jazz girl. Indigo is still being endorsed by Shan (actor/director) and Zainab Qayyum (model/actress) and of course the Ladies First promoter is none other than Sunita Marshall (nominee for 'Best Female Model' in the forthcoming Lux Style Awards). Ufone, Paktel and Warid have no famous personality endorsing their brand. They have used 'typical persons,' those paid actors or models who portray or resemble everyday people. Respondents have not seen any Instaphone advertisements; therefore it scores the least number of responses.

6. State the promotional campaigns that are displayed on billboards by the following companies.

Mobilink- Indigo	7	8%
Mobilink-Mobitunes	2	2%
Mobilink- Ladies First	4	2%
Mobilink- Jazz Octane	1	2%
Mobilink- Pirates of the Caribbean	1	18%
Mobilink- Survivor Pakistan	1	54%
Ufone- Prepay	9	14%
Telenor- Talkshawk	27	8%
Telenor- Smart Call	7	26%
Telenor- Djuice	4	22%
Al-Warid- Zem Prepaid	13	8%
Paktel- Talk free	11	2%
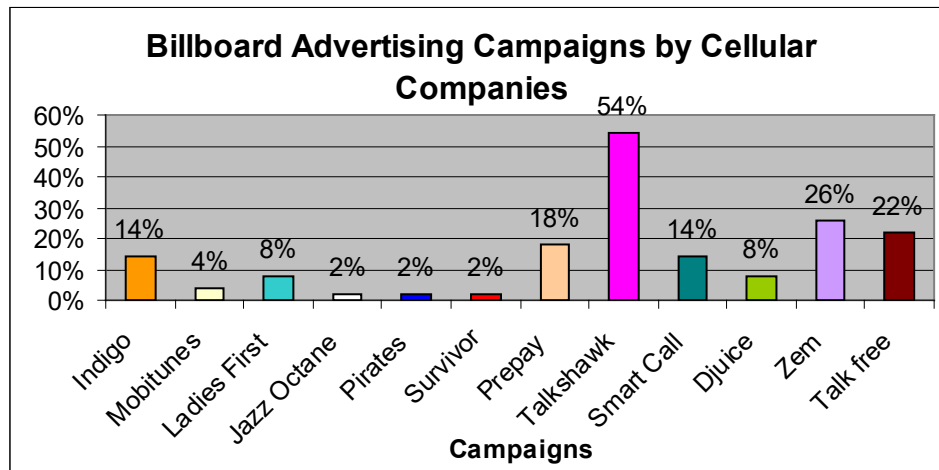
Telenor Talkshawk again scored well compared to other mobile companies. This question, elicited responses about cellular advertisements displayed on billboards. Twenty-seven respondents recalled Telenor's Talkshawk, whereas only seven could remember Telenor's Smart Call. Thirteen respondents wrote down Warid's Zem Prepaid and 11 respondents were aware of Paktel's Talk free advertisement. These three packages are the latest offering by Telenor, Warid and Paktel, the print and electronic media are full of adverts explaining these packages.

Most of the respondents could not recall the taglines of the older advertisements; they only remembered the brand i.e. Indigo, Jazz, Prepay which have been advertised, from time to time, on billboards. Other advertising campaigns that recently introduced new services like Mobitunes, Ladies First, Jazz Octane and Djuice got the least response. The new packages with the exception of Talkshawk, Zem and Talk free have not been able to attract attention. The advertisements lack the vigor to entice consumers to remember and make the brand part of their evoked set.

7. Generally what catches your attention, when looking at an advertising campaign displayed in the outdoors?

Model/celebrity	25	48%
Text and color	8	16%
Shape of billboard or advertisement	6	12%
Product shown or service offered	12	24%

Content of Billboard that Attracts Attention
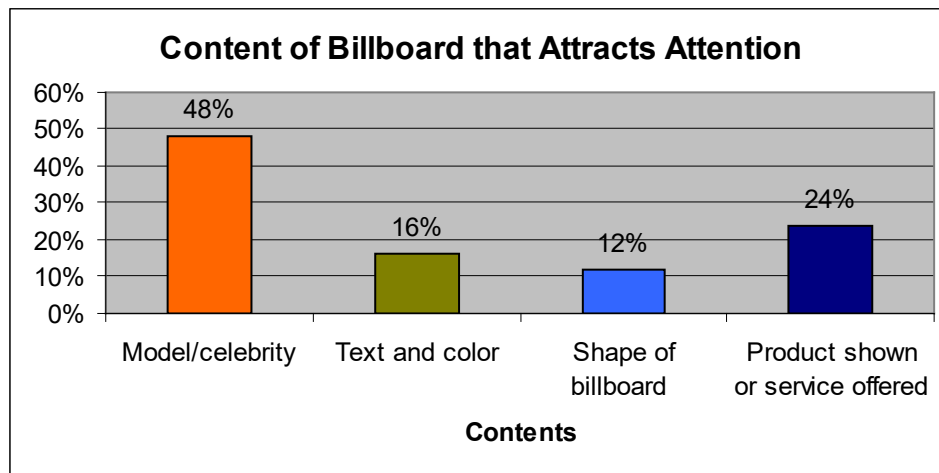
Here, respondents were asked to express their view, about what attracts them on a billboard, is it the model/celebrity, the text/color, the shape or the product. Majority went with the first option, around 25 respondents said that celebrity endorsed billboards attract their attention. Twelve respondents think it is important to look at the advertised product because that is what the company will sell to its customers. Eight people prefer text/color and six go for the shape of the billboard.

This question supports the result of question number five, where people rated Telenor and Mobilink the highest because they use celebrity endorsers to enhance their product's brand equity. Celebrities and models help create emotional bonds with the product and in Pakistan especially, are excellent visuals for billboards. For example Marina Khan and Mehreen Raheel are not part of the Telenor Smart Call commercial running on television but their faces are visible on ever Smart Call billboard. According to advertisers, even if the consumer cannot recall the brand or its tagline, they will be able to remember the celebrity endorsing that brand.

The color and text are also very important in outdoor advertising. The lesser the text, the more the impact and the maximum outdoor copy is seven words. The color value and hue are necessary to consider when designing an advertisement for the outdoors. For example Telenor's Talkshawk, has good visibility from a greater distance because the colors pink and blue, stand out on a white canvas. The Smart Call billboard is not clearly visible, because the colors are similar, that is both dark blue and black are generally similar on hue and value.

8. Rate the promotional campaigns you like?

Rating 1-best; 5-worst

	1	2	3	4	5
Telenor Talkshawk	17	5	7	0	5
Telenor Smart call	1	8	4	4	3
Warid's Zen	0	5	7	0	5
Paktel's Talk free	4	6	3	4	3
Mobilink's Ladies First	3	7	7	4	3
Mobilink's Jazz Octane	4	3	7	2	3
Ufone's Prepay	4	9	4	3	1
Mobilink's Mobitunes	2	3	4	7	4
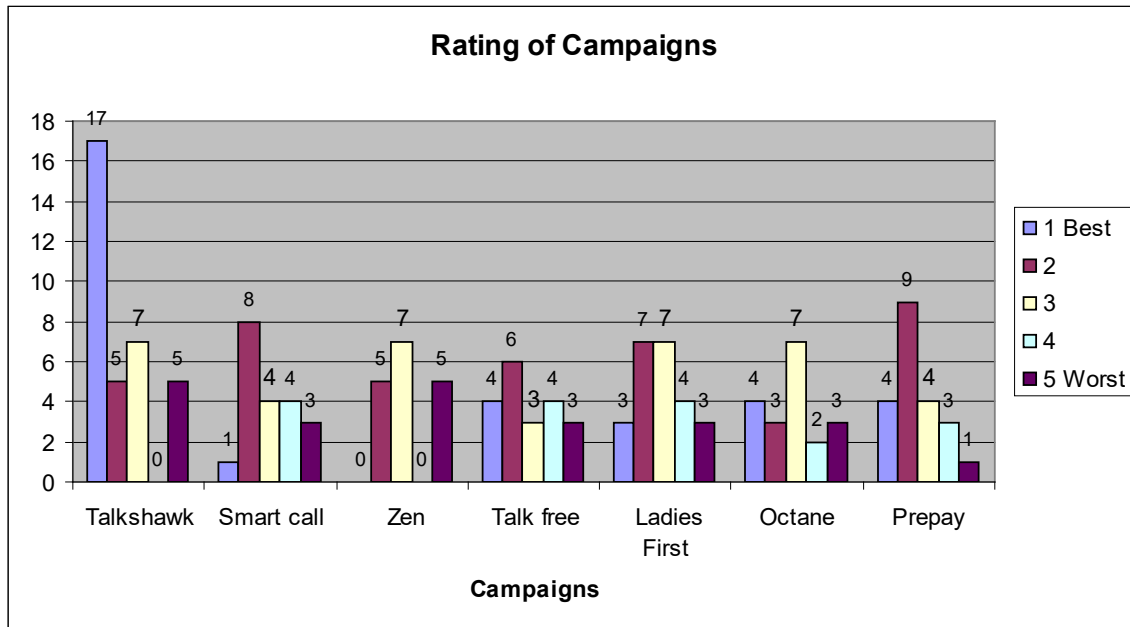
This particular question asked respondents to rate the stated promotional campaigns on a scale from one to five, with one being the best and five the worst. Seventeen people rated Talkshawk as the best campaign. Nine, respondents view Ufone's Prepay as a good one and the rest of the campaigns like Smart call, Zen, Talk free, Octane and Ladies First were all considered average. Only five respondents rated Talkshawk as the best campaign, same goes for Warid's Zen and only one considered Ufone's Prepay the worst.

The electronic and print campaigns of Talkshawk were a real success. The jingle was the selling point of the commercial, which was beautifully executed to convey the benefits of the package. Ali Zafar (singer) and Sonia Jehan (actress) were aptly casted to reflect the image of the new service. These days outdoor is the only medium, which reminds consumers that Telenor recently launched Talkshawk package. Since the print and electronic media are expensive, advertisers first created initial hype on the electronic and print mediums and then steadily lowered the frequency of the ads. Now they have reverted to the outdoor medium that is the billboard.

9. Do you think billboard advertising being done by the following cellular companies is persuasive or informative?

	Persuasive	Informative	Persuasive	Informative
Mobilink	27	5	54%	10%
Ufone	19	11	38%	22%
Telenor	26	7	52%	14%
Al-Warid	15	12	30%	24%
Instaphone	11	4	22%	8%
Paktel	15	12	30%	24%
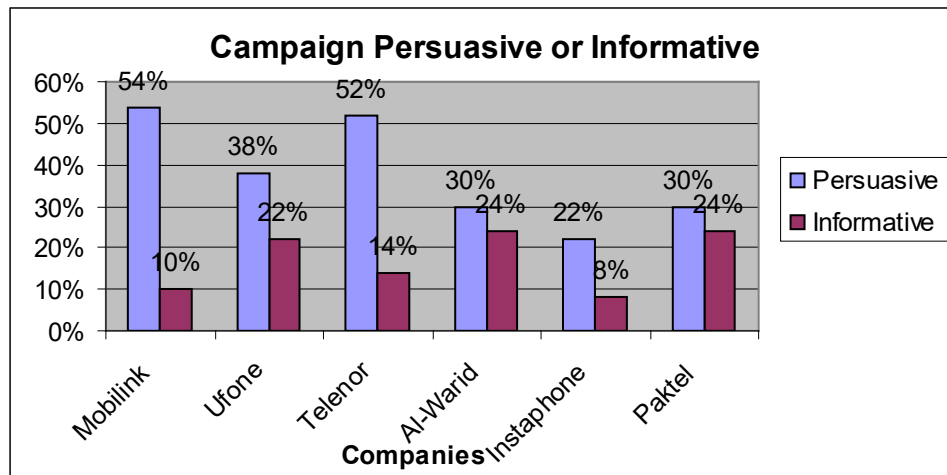
Advertising theory suggests that advertisements need to be built around a certain appeal; they can either be based on fear, humor, music, rationality, emotions or scarcity. All this depends on the message, product and of course the target audience. Respondents think most of the advertisements by cellular companies happen to be persuasive rather than informative, meaning they make false promises, just to entice the consumer to make a purchase. For example, Jazz Octane, advertised along the lines that older people can be young again if they buy this connection.

Mobilink and Telenor's campaign are considered more persuasive as compared to Ufone's, Warid and Paktel. Each advertisement is built on a different appeal and executed differently. The main executional frameworks are animation, slice-of-life, dramatization, testimonial, authoritative, demonstration, fantasy and informative. Mobilink's recent invention, Ladies First, ad appeal is musical and it is executed through slice-of-life framework. Take Djuice as an example, in every advert, they are emphasizing their target market that is the youth but they have dramatized the look of youngsters giving them are more rebellious look. Warid, Ufone and Paktel advertisements inform the audience about the benefits of the package. They are based more around the rational appeal and their executional framework is informative.

10. After seeing the advertisements, which cellular connection would you like to buy at the end of the day?

Mobilink	13	26%
Ufone	12	24%
Telenor	15	30%
Al-Warid	7	14%
Instaphone	0	0%
Paktel	3	6%
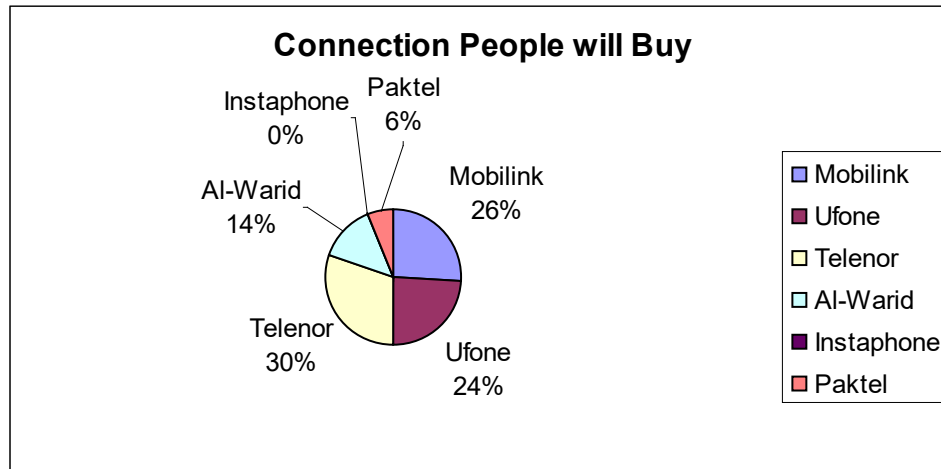
Advertisements can convince consumers to make a purchase at least that is what advertisers hope to achieve. The result of this question supports this theory. Even though many people do not like Mobilink's service, it still scored high on this question. Respondents were asked which cellular connection they would like to buy at the end of the day, after seeing the advertisements. Fifteen respondents preferred Telenor, thirteen voted for Mobilink, twelve went for Ufone and only seven people chose Warid.

This shows that advertisements can influence consumers to make a decision but other things matter when making the final purchase like price, quality of service, network coverage and value added service. Advertising makes a promise to the consumer about the product and it is the marketing and operations that has to deliver that promise. The goals of any advertising are to first inform, then persuade and in the end reinforce the message. Advertising does all three but the final decision is always made by the consumer.

Most people responded that they would like to buy Telenor and Mobilink because both are advertising a lot. Mobilink is certainly upgrading its image by associating its name with programs and movies like Pirates of the Caribbean and Survivor Pakistan. Ufone is also a favorite because of its cheap rates. Since, now it has changed it positioning from a low Awami connection to a hip, chic and modern one targeted to the youth of Pakistan, people like it even better.

11. From where do you first hear about the new advertisements of cellular companies?

Television	17	34%
Newspaper or magazines	17	34%
Outdoor-billboards etc	7	14%
Friends	3	6%
Radio	6	12%

Medium that Informs You First About Advertisements

Radio
12%

Friends
6%

Outdoor-billboards
14%

Television
34%

Newspaper or magazines
34%

- ☐ Television
- ☐ Newspaper or magazines
- ☐ Outdoor-billboards
- ☐ Friends
- ☐ Radio
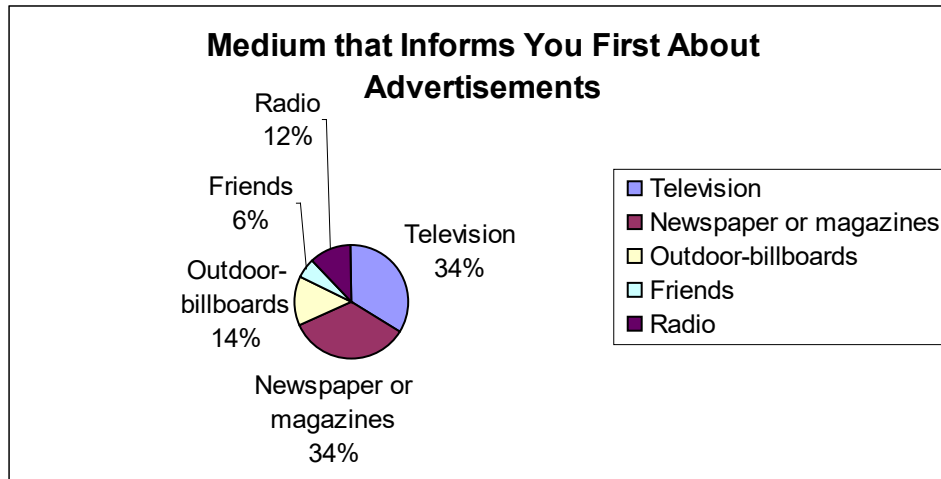
The medium that carries the advertiser's message is the vital connection between the company and its target audience. The major channels of mass communication that make this connection possible are: television, radio, newspapers, magazines and out-of-home media like billboards. Cellular companies advertise on all these mediums. The campaign starts off with the commercial airing on television and radio. At the same time, print ads are visible in every major newspaper and magazine. Once, the print and electronic media are exhaustively utilized, the campaign is displayed through out the city on billboards. Sometimes advertisers follow a different sequence like in the case of Djuice, The advertising and marketing campaign of Djuice created intrigue and hype amongst the Pakistani population by displaying teasers in major newspapers of the country including Dawn, the News, and Jang Urdu. Road side banners hung in all major cities of Pakistan (Karachi, Lahore, and Islamabad), with teasers like: *Save your eyes for djuice, save your breadth for djuice and save your thumbs for djuice.*

This particular question asked consumers to state, which medium informs them about new cellular advertisements. Around 34 respondents believe television and newspapers make them aware of a new product or service. Outdoor billboards are not used by advertisers to establish first time contact with consumers. They are not the first medium to inform consumers. This means that outdoor acts as a complementary to both television and newspaper. Advertisers use television and newspapers because of their extensive reach and frequency potential through out the country.

12. Do you think celebrity endorsement on billboards attract more attention and thus enhance the image of the brand?

Yes	33	66%
No	17	34%

Celebrities on Billboards Attract Attention
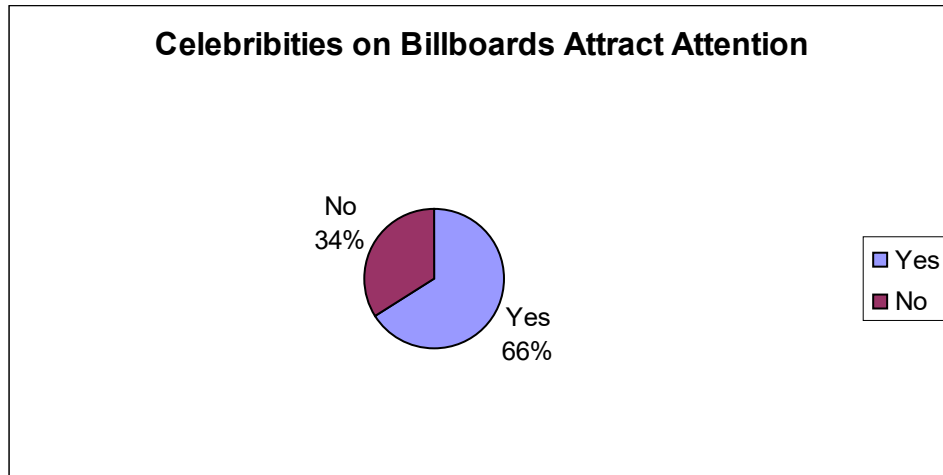
Celebrity endorsers are not cheap, but many advertisers continue to believe in their effectiveness. It is believed that famous faces capture attention and are processed more efficiently by the brain than are 'ordinary faces.' Respondents believe this phenomenon to be true, 33 of them agree with the question that celebrity endorsement on billboards attracts more attention and enhances the image of the brand.

The results of this question support question number five and eight. Only Telenor and Mobilink believe in celebrity endorsement. Celebrities like Shan and Marina Khan, increase awareness of the firm's advertising and enhance both the company image and brand attitudes. The cellular industry is plagued with intensive competition, and since each company offers the same generic service, celebrity endorsement can be an effective way to differentiate the advertising campaigns.

Star power works because celebrities embody cultural meanings, they may symbolize important categories such as status and social class. Celebrities have a certain image attached with them and advertisers want the product to embody that image or vice versa. Ideally, this theory would generate positive results in foreign countries, but in Pakistan celebrities are put in advertisements just to attract attention. Take the example of Iman Ali in Mobilink Jazz, she is just a pretty face that holds a mobile and poses for the camera.

4.4 Likert Scale Findings and Interpretation:

4.4.1 Likert Scale:
Likert scale also known as summated rating scale measures attitudes by getting respondents to indicate their degree of agreement or disagreement with a series of

statements. In this study a five point likert scale ranging from 'highly agree' to 'highly disagree' has been used. The nine items in the likert scale are general statements about outdoor advertising. The respondents can either; highly agree, agree, disagree or highly disagree with the statements. Following is the key of the likert scale that shows the score assigned to each response category.

Table 11: Key of Likert Scale:

Response Category	Score
Highly Agree	5
Agree	4
Don't Know	3
Disagree	2
Highly Disagree	1

The outcome of the likert scale is measured by calculating the mean score of each item.

$$\textbf{Mean score} = \frac{\text{Total score}}{\text{Number of respondents}}$$

The 'number of respondents' varies for each item since not all 50 respondents filled the likert scale. To interpret the meaning of the mean score, it is compared with the maximum score.

$$\textbf{Maximum score} = \frac{\text{Number of respondents x 5}}{\text{Number of respondents}}$$

The purpose of this scale was to get consumer's point of view about positive and negative aspect of billboard advertising. Statements one, two, five and six refer to the effectiveness, impact, creativity and informative features of billboards, whereas items four, seven, eight and nine explain the negative aspects. Following table lists all the nine items.

Table 12: Items of Likert Scale

1. Outdoor advertising is effective in attracting attention
2. Outdoor is making an impact on consumers and they buy the advertised product/service
3. It is adding color to the environment
4. Billboards are not hazardous
5. Billboards lack creativity, many are plain and monotonous
6. It is a good way to inform the ordinary consumer
7. Billboards are adding clutter and crowding the surrounding environment
8. People do not pay attention to billboards since they are driving by
9. Billboard advertising is better than TV or newspapers advertising

The result of each item will be presented in tabular form. The tables will show calculations of the maximum and mean score and the bar charts will give visual illustration of each score.

Item #1: Outdoor advertising is effective in attracting attention

Category	Score	No. of respondents	Total Score
Highly Agree	5	11	55
Agree	4	24	96
Don't Know	3	2	6
Disagree	2	7	14
Highly Disagree	1	1	1
Total		45	172

Mean Score of Item = $\dfrac{\text{Total Score}}{\text{Number of Respondents}}$

Mean = 3.8222
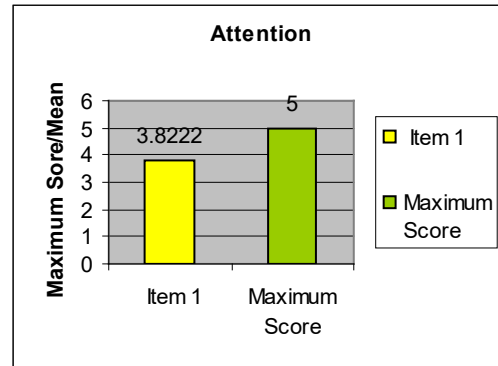
Respondents agree with the statement that outdoor advertising attracts attention. Advertisements are considered effective, when they cut through the clutter and command attention. Outdoor is one medium through which local advertisers are able to achieve this goal. Huge billboards, decked with luscious background colors and faces of famous models/celebrities help in attracting attention. The placement of such eye-catching billboards along major thoroughfares of the city makes it impossible for people to ignore them.

Item #2: Outdoor is making an impact on consumers and they buy the advertised product/service

Category	Score	No. of respondents	Total Score
Highly Agree	5	10	50
Agree	4	14	56
Don't Know	3	10	30
Disagree	2	6	12
Highly Disagree	1	0	0
Total		40	148

Mean Score of Item = $\dfrac{\text{Total Score}}{\text{Number of Respondents}}$

Mean = 3.7
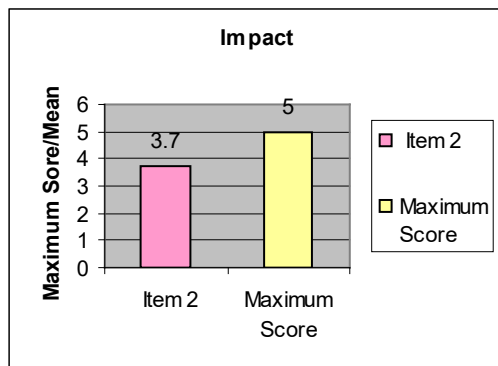
Billboards are often the last advertisement viewed before the point-of-purchase. Respondents believe that outdoor ads can actually induce purchase. K. Yousaf recently conducted a media research, printed in the 2005 Aurora issue, which produced the same set of results as the above statement. According to his research, around 36 percent of the people believe that billboards are the most effective medium that help in making a decision and the passive nature of billboard helps the medium retain its effectiveness. (See exhibit # 2 in appendix for K. Yousaf's media research)

Item #3: It is adding color to the environment

Category	Score	No. of respondents	Total Score
Highly Agree	5	8	40
Agree	4	15	60
Don't Know	3	3	9
Disagree	2	12	24
Highly Disagree	1	0	0
Total		38	133

Mean Score of Item = Total Score / Number of Respondents

Mean = 3.5
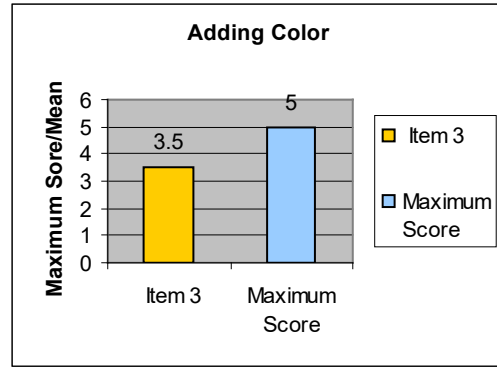
Item three has a mean score of 3.5, relatively less than the first two statements. Total of fifteen respondents agreed with the statement whereas only twelve disagreed with it. Billboards do add color to the environment if they are designed and placed according to the rules and regulations of the governing authority. Since many companies are advertising, each billboard has a different visual and text that stands out in the crowd. According to K. Yousaf, respondents feel billboards are a form of pollution, while 52 percent found them interesting. (See exhibit # 2 in appendix for K. Yousaf's media research)

Item #4: Billboards are not hazardous

Category	Score	No. of respondents	Total Score
Highly Agree	5	1	5
Agree	4	12	48
Don't Know	3	12	36
Disagree	2	14	28
Highly Disagree	1	3	3
Total		42	120

Mean Score of Item = Total Score / Number of Respondents

Mean = 2.8571
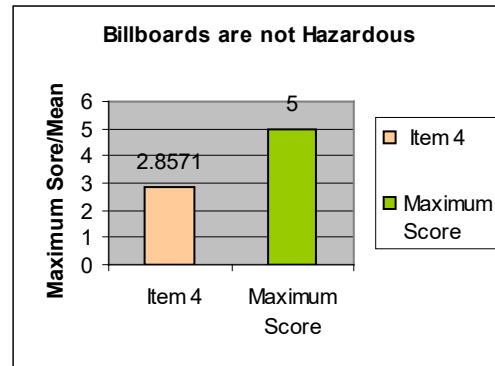
Respondents disagree with the statement; around 14 people think that billboards are hazardous. There are 5,000 billboards in Rawalpindi, against the allowed limit of 2,000. Most of the billboards are not firmly installed and they are posing risk to the life and property of the people. The regulatory authorities are doing nothing to curtail the mushroom growth of billboards. The growth in outdoor media has been good news for outdoor companies and billboards site owners, but the sector remains highly unregulated. Since some billboards collapsed and killed innocent citizens, this medium has been a hot topic of discussion in many major newspapers and magazines like Dawn, Nation, Daily Times, The News and Aurora. (See exhibit # 3 in appendix for articles on billboards being unsafe and adding clutter to the environment)

Item #5: Billboards lack creativity, many are plain and monotonous

Category	Score	No. of respondents	Total Score
Highly Agree	5	4	20
Agree	4	9	36
Don't Know	3	6	18
Disagree	2	17	34
Highly Disagree	1	2	2
Total		38	110

Mean Score of Item = $\dfrac{\text{Total Score}}{\text{Number of Respondents}}$

Mean = 2.89

Billboards lack Creativity
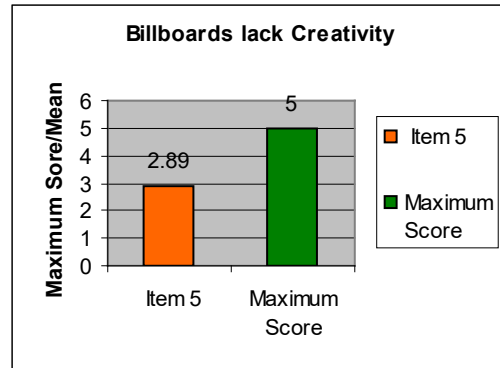
Respondents disagree with this statement that billboards lack creativity. The new technologies offer a larger display and the spectacular features of lights, animation, and brilliant color give billboards a new dimension. Billboards when compared to television fall short on the creative element. They have to make an impact with minimum text and graphics, which is quite a challenge for most advertisers. But the movable message technology, backlighting, digital and LED technology as well as vinyl and computerized printing will make outdoor advertising even more attractive.

Item #6: It is a good way to inform the ordinary consumer

Category	Score	No. of respondents	Total Score
Highly Agree	5	13	65
Agree	4	21	84
Don't Know	3	2	6
Disagree	2	6	12
Highly Disagree	1	0	0
Total		42	167

Mean Score of Item = $\dfrac{\text{Total Score}}{\text{Number of Respondents}}$

Mean = 3.98

Billboards are Informative
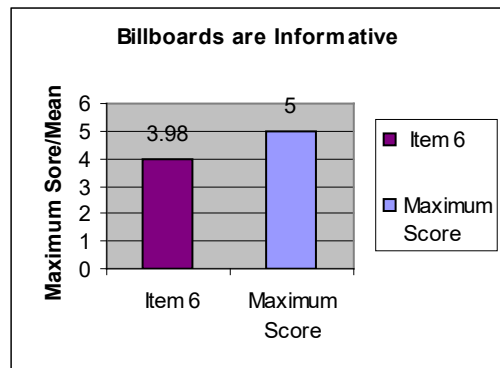
Majority of the respondents, feel billboards are a good source of information, especially since the consumer of today is overstressed with work and home obligation that they hardly have time to watch television. Interim goals of advertising are information, persuasion and reinforcement. When a product is introduced in the market, the objective of any advertising medium is to increase brand awareness. Billboard advertising is an ideal tool, to use, to inform customers about the company's new product and services.

Even local retailers are using billboards to inform customers about sales and discounts they are currently running at their stores. Take the example of the recently launched services by cellular companies. Telenor Talkshawk advertisements appear less on television, thus billboards now inform consumer about the prepaid package by stating the

call rates for Telenor to Telenor and Telenor to other networks. Warid's 'Zem 321 countdown' is explained in just eight words, *"the more you talk the less you pay."*

Item #7: Billboards are adding clutter

Category	Score	No. of respondents	Total Score
Highly Agree	5	7	35
Agree	4	19	76
Don't Know	3	4	12
Disagree	2	9	18
Highly Disagree	1	1	1
Total		40	142

Mean Score of Item =   Total Score
                  Number of Respondents

 Mean = 3.55
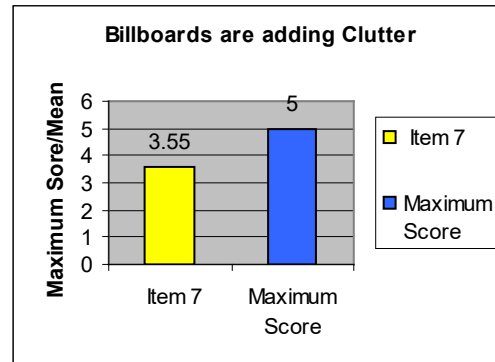
Many respondents feel that billboards are indeed polluting the environment. This statements supports statement number four that billboards are hazardous. The number of signboards in Lahore has doubled in the past two years despite a ban. The situation in Rawalpindi is somewhat similar in nature. Billboards are concealing skyline, obstructing view and are noticed more than the landscape. Since the purpose of these advertisements is obviously to attract attention, they become distracting, especially the jumbo-sized billboards. (See exhibit # 3 in appendix for articles on billboards being unsafe and adding clutter to the environment)

Item #8: People do not pay attention to billboards since they are driving by

Category	Score	No. of respondents	Total Score
Highly Agree	5	0	0
Agree	4	10	40
Don't Know	3	6	18
Disagree	2	27	54
Highly Disagree	1	1	1
Total		44	113

Mean Score of Item =   Total Score
                  Number of Respondents

 Mean = 2.57
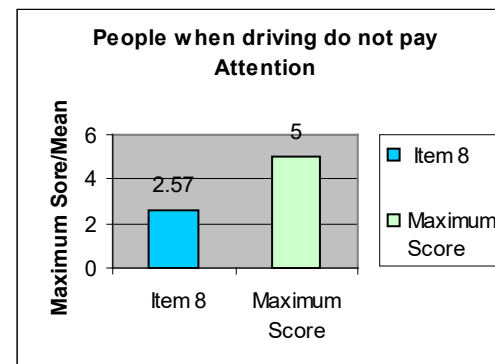
Respondents disagree with the statement that people do not pay attention to billboards as they are drive by. Even though one of the disadvantages of outdoor advertising stated earlier in the literature review was 'fleeting message.' Cars do drive by quickly; but advertisers have designed billboards to tell a brief story and attract attention. If one only thinks of the traffic jams now typical of metropolitan cities and the fact that advertisers have erected billboards at major traffic signals, people are now exposed to a message long enough to recall it.

Item #9: Billboard advertising is better than TV or newspaper advertising

Category	Score	No. of respondents	Total Score
Highly Agree	5	3	15
Agree	4	14	56
Don't Know	3	3	9
Disagree	2	21	42
Highly Disagree	1	3	3
Total		44	125

Mean Score of Item =   Total Score

Number of Respondents

Mean = 2.84
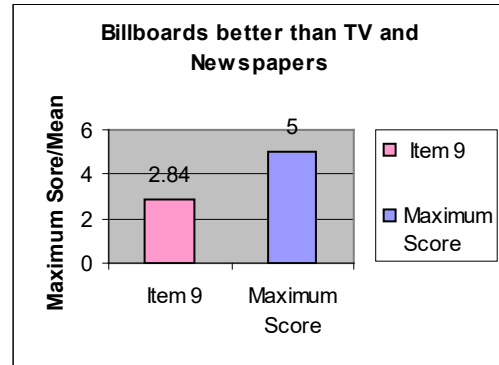
Majority of the respondents disagree with this statement. Billboards act as a complementary media to television and print advertising. They can not replace the primary medium of communication. Advertisers use billboards because television and newspaper advertising is very expensive. People find television to be intrusive and annoying, as advertisements appear between programs. Billboard advertisements are not creative like television commercials either. Television commercials can communicate product details, competitive advantages and specific consumer benefits better than billboards.

4.5 Literature Review Analysis:
Positioning

4.5.1 Positioning Analysis:
Positioning refers to the place an offering occupies in consumers' minds on important attributes relative to competitive offerings. The approach used for the positioning of various cellular brands, is *head-to-head positioning*. It involves competing directly with competitors on similar attributes in the same target market. Each cellular brand will be placed with respect to its various competitors. The cellular industry in Pakistan is facing a cut throat competition since there are many brands targeting the same set of customers belonging to different social class. Mobilink, Ufone, Telenor, Warid, Paktel and Instaphone are competing head on with each other. The brands have tried various ways to distinguish themselves from the rest but most of them offer the same set of services and benefits. Advertising is one way; each brand is trying to differentiate itself. The focus of this research is outdoor advertising but before billboards of each brand are analyzed, a positioning analysis will determine where cellular companies stand.

4.5.2 Perceptual Maps:
The position of a product in comparison to its competitors can be exemplified with the assistance of a perceptual map. Perceptual mapping is a graphical method that defines the market in terms of the way buyers perceive key characteristics of competing products. Ten attributes are being taken for the perceptual mapping of the cellular companies and accordingly five perceptual maps will be made. The following attributes/dimensions, according to customers, are very important for evaluating a mobile network operator's service. There are many articles that review the status of the various telecom companies in the industry. The maps have been drawn to illustrate these statuses with respect to various attributes. (See exhibit # 4 in appendix for articles on cellular companies)

- ✓ **Customer care vs. connectivity:** People want their mobile connection to have good connectivity level, meaning they want it to connect anytime to any mobile number anywhere in the country but that is sometimes not possible. Mostly consumers call customer service centers in reference to connectivity issues. This combination measures the connectivity level and the customer care level of each company.
- ✓ **Price vs. value added services:** Price is very important element when buying a connection. Companies are charging higher prices for the value added services but some are charging less. This combination measures the price a company charges for the services offered.
- ✓ **Network quality vs. coverage:** The more the coverage the better the quality, that is what most companies are promoting in their ads. This is not the case in reality, most connections have the worst quality but their coverage is huge.
- ✓ **Brand reputation vs. promotional campaign:** This combination measures the brand status established through promotional campaign in the eyes of consumers.
- ✓ **Financial strength vs. international expertise:** Companies are earning lots of profits but are they using these resources to expand service abroad or not. Since the emergence of Warid and Telenor, international services are being offered by every connection in many countries.

4.5.3 Key Players:

The major players in the industry are targeting the same set of customers through different prepaid and post paid packages. Following are the perceptual maps showing major players in the competitive cellular industry.

4.5.3.1 Perceptual Map 1:

Name	Customer Care	Connectivity
Mobilink	4	2
Ufone	1	3
Telenor	5	3
Warid	5	5
Paktel	1	2
Instaphone	2	2

Rating: 1-low and 6-high

Rating: 1-low (bad customer service and bad connectivity and 6-high (meaning good customer service and connectivity)
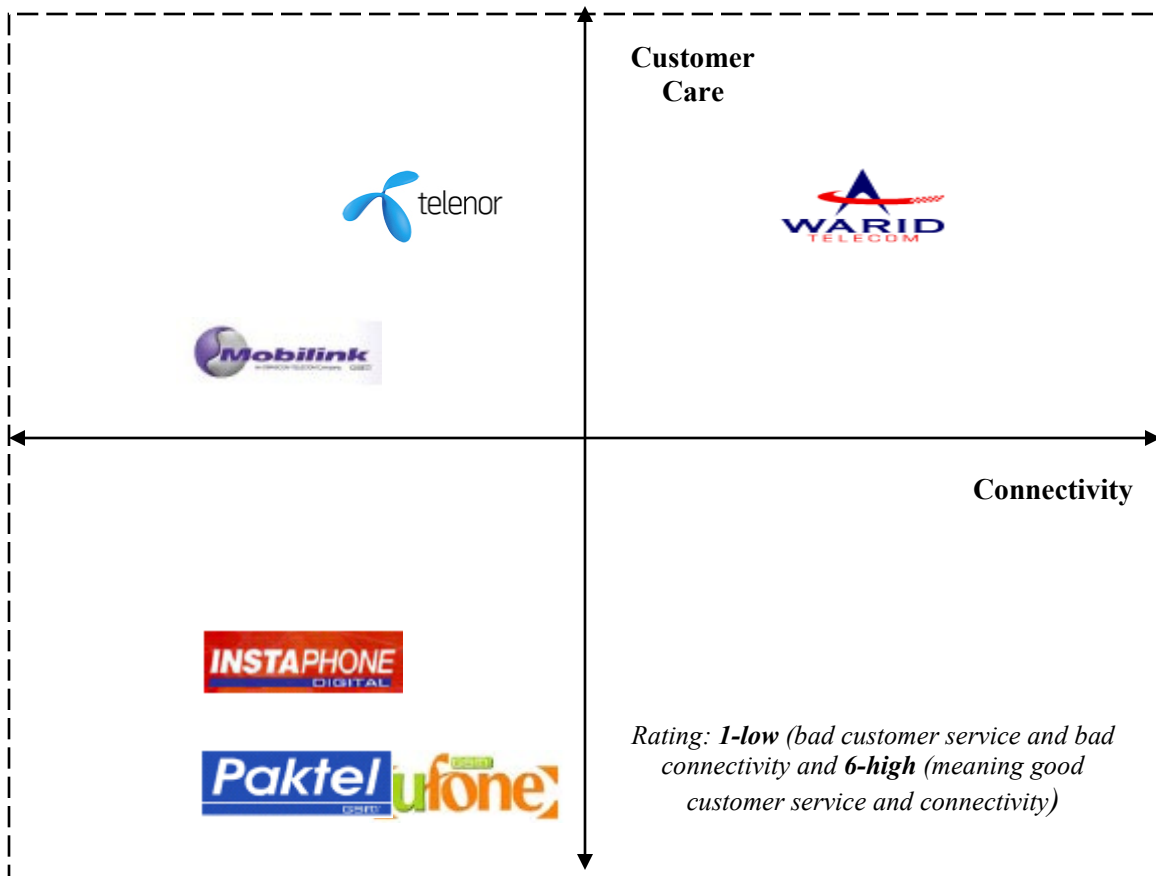
Warid ranks high on both dimensions. The customer service centers of Telenor and Warid are conveniently located in major bazaars so that the customer can easily access them. There are not many Ufone and Mobilink service centers. Ufone is not so good on the customer care dimension but connectivity wise it ranks high. Paktel and Instaphone do not have an extensive network of customer service centers either.

4.5.3.2 Perceptual Map 2:

Name	Price	Value Added Services
Mobilink	1 (Expensive)	4
Ufone	5 (Cheap)	5
Telenor	2	4
Warid	4	3
Paktel	5	1(Less VAS)
Instaphone	2	1

Rating: 1-low and 6-high
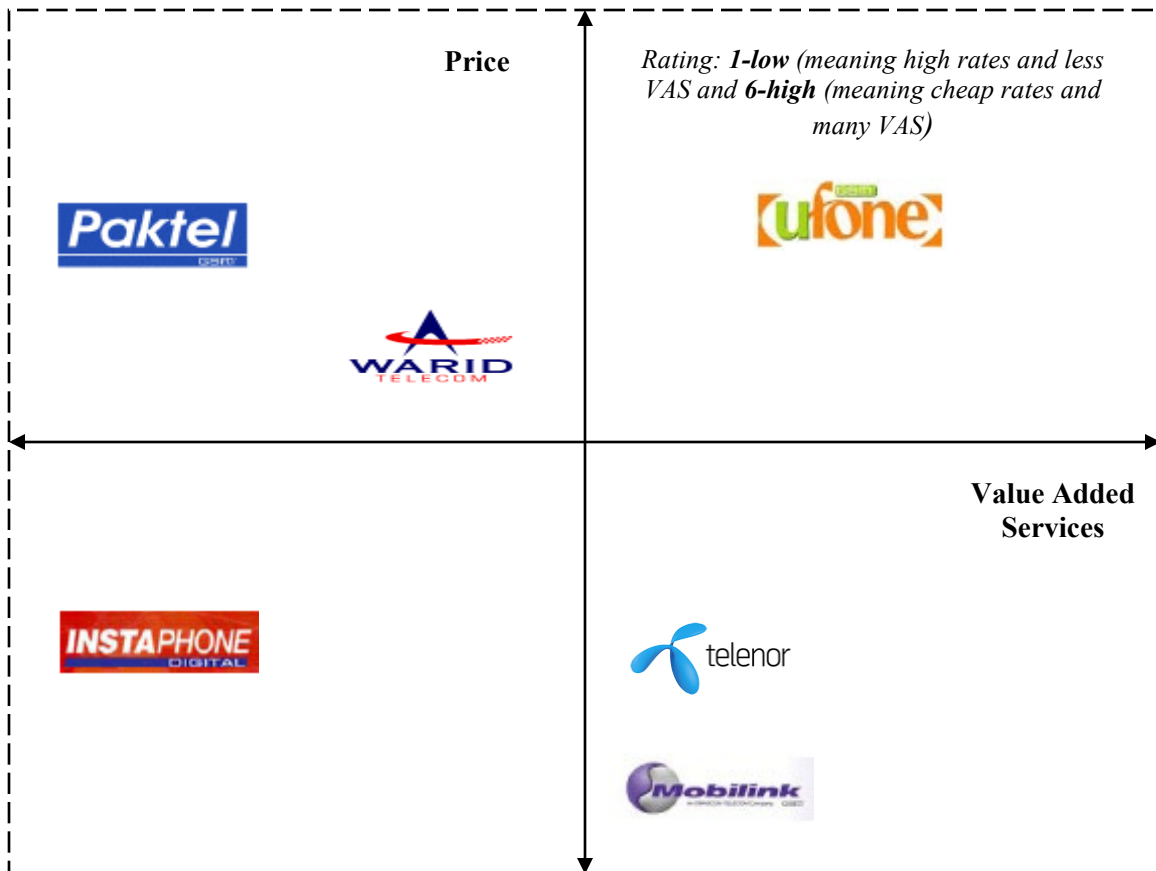
Ufone offers the cheapest per minute rates for all networks. Warid, to some extent, and Paktel, to a large extent should be credited with introducing billing for smaller denominations than a minute. Warid and Paktel both have gone down to 1 second billing. The market is however, hovering over call rates between Rs. 2 and Rs. 3 per minute despite the price wars. Ufone was the first to introduce the VAS offerings, but soon they were adopted by other cellular companies. Ufone has positioned itself as technologically advanced and hence keeps on innovating by introducing new services like the recently launched, Ufone book saver. Ufone ranks high on this dimension, followed by Warid, Telenor and Mobilink, all cellular companies are offering their customers the same set of value added services with slight differences in their content.

4.5.3.3 Perceptual Map 3:

Name	Network Quality	Coverage
Mobilink	3	6
Ufone	4	3
Telenor	5	2
Warid	5	2
Paktel	2	1
Instaphone	1	4

Rating: 1-low and 6-high
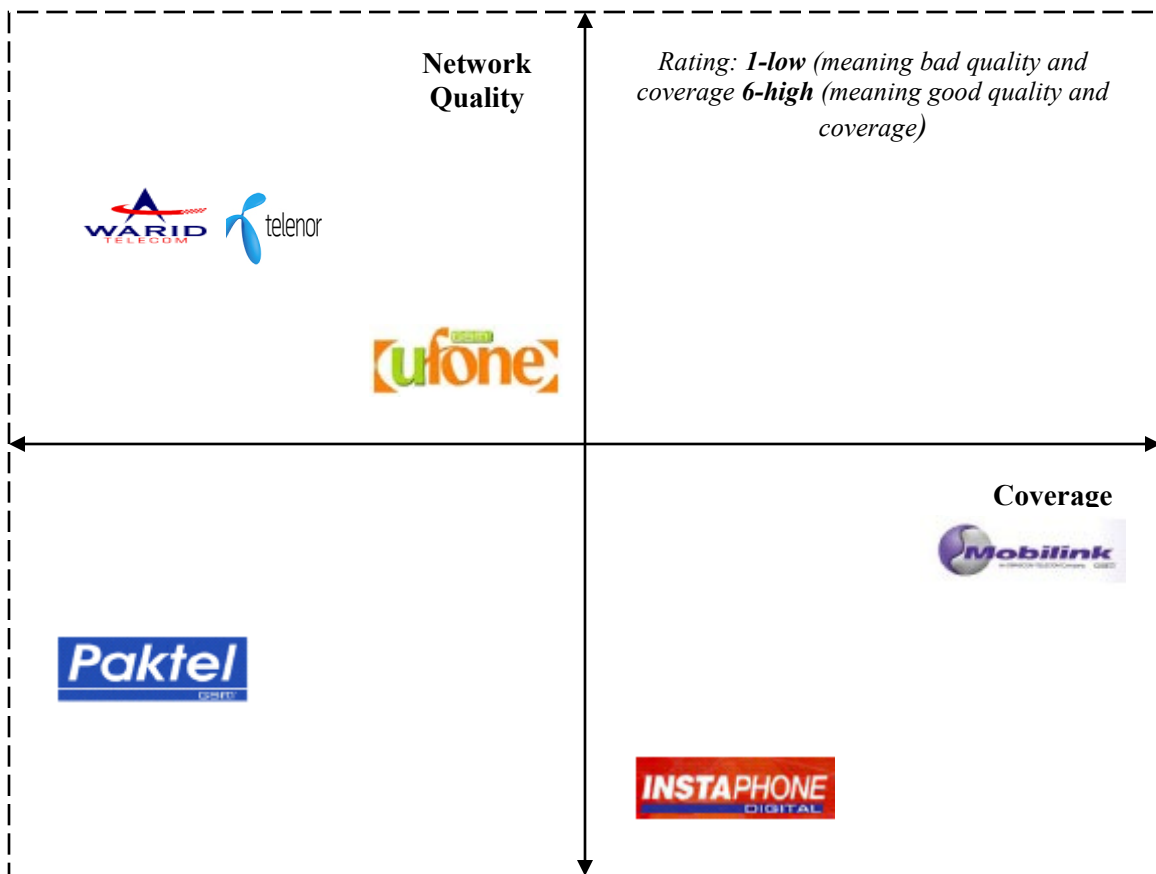
Mobilink has the highest network coverage of all the other mobile services but that does not mean its network quality is the best. Mobilink's network is always jammed and people are not able to call other numbers. Telenor was available in 200 cities as of January 1, 2006, now the number is close to 500. Warid has also expanded its network to other cities of Pakistan. Instaphone and Paktel lack on both dimensions as people are buying a lot of Warid connections because of its good voice quality and plus Ufone for its cheaper rates.

4.5.3.4 Perceptual Map 4:

Name	Brand Reputation	Promotional Campaign
Mobilink	6	5
Ufone	3	2
Telenor	5	6
Warid	4	3
Paktel	2	1
Instaphone	1	1

Rating: 1-low and 6-high

*Rating: **1-low** (meaning bad reputation and less promotional campaigns **6-high** (meaning good reputation and many advertisements)*
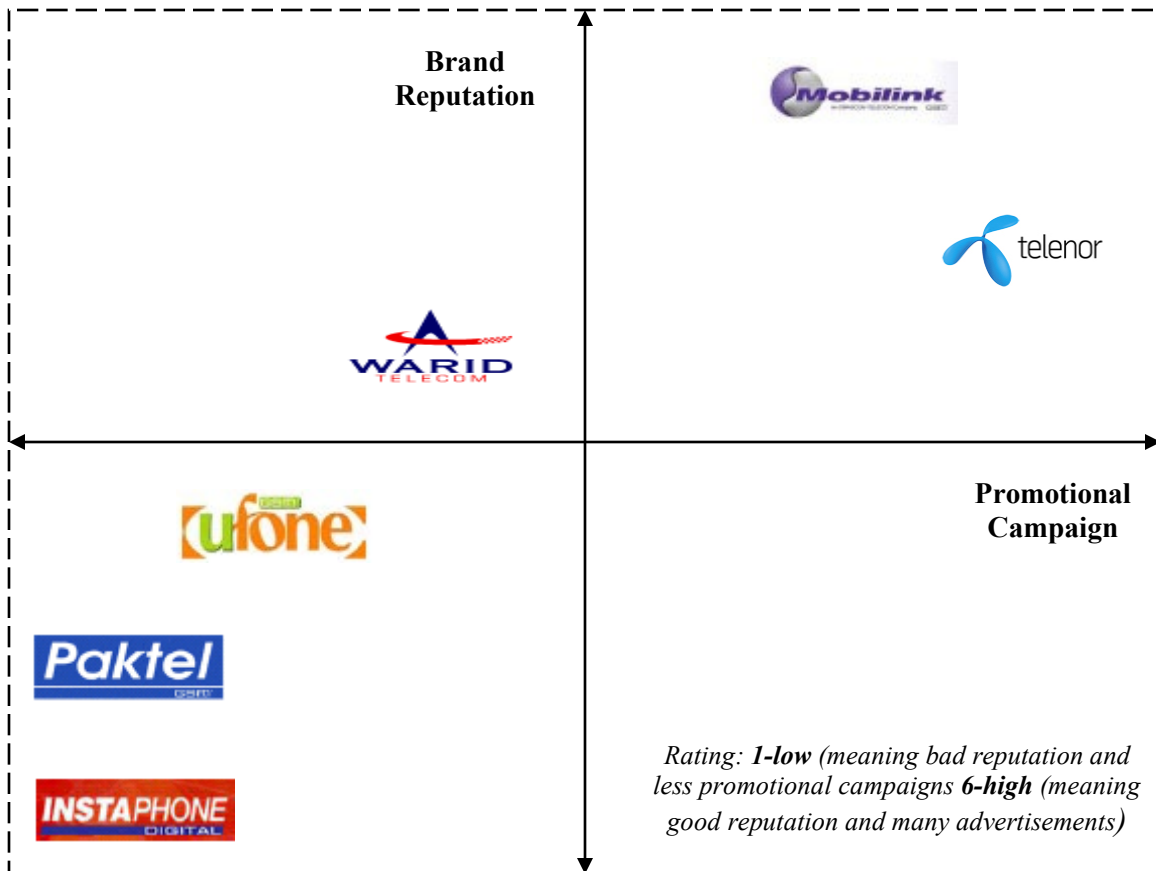
Mobilink and Telenor have recently launched new set of services. They are advertising a lot in the electronic, print and outdoor media. Warid has also launched six new Zem prepaid packages and it is only advertising in newspapers and on billboards. The promotional campaigns have enhanced the brand image of Telenor, Mobilink and Warid. People find Telenor advertisements to be really attractive and out of the box type. Paktel's advertisements are typically the same where a boy and girl are talking and explaining the benefits of the package. Ufone is targeting the youth, so its new advertisements are really hip and chic. Mobilink and Telenor's brand reputation has increased because of their promotions.

4.5.3.5 Perceptual Map 5:

Name	Financial Strength	International Expertise
Mobilink	3	4
Ufone	2	3
Telenor	4	6
Warid	4	4
Paktel	1	1
Instaphone	2	1

Rating: 1-low and 6-high
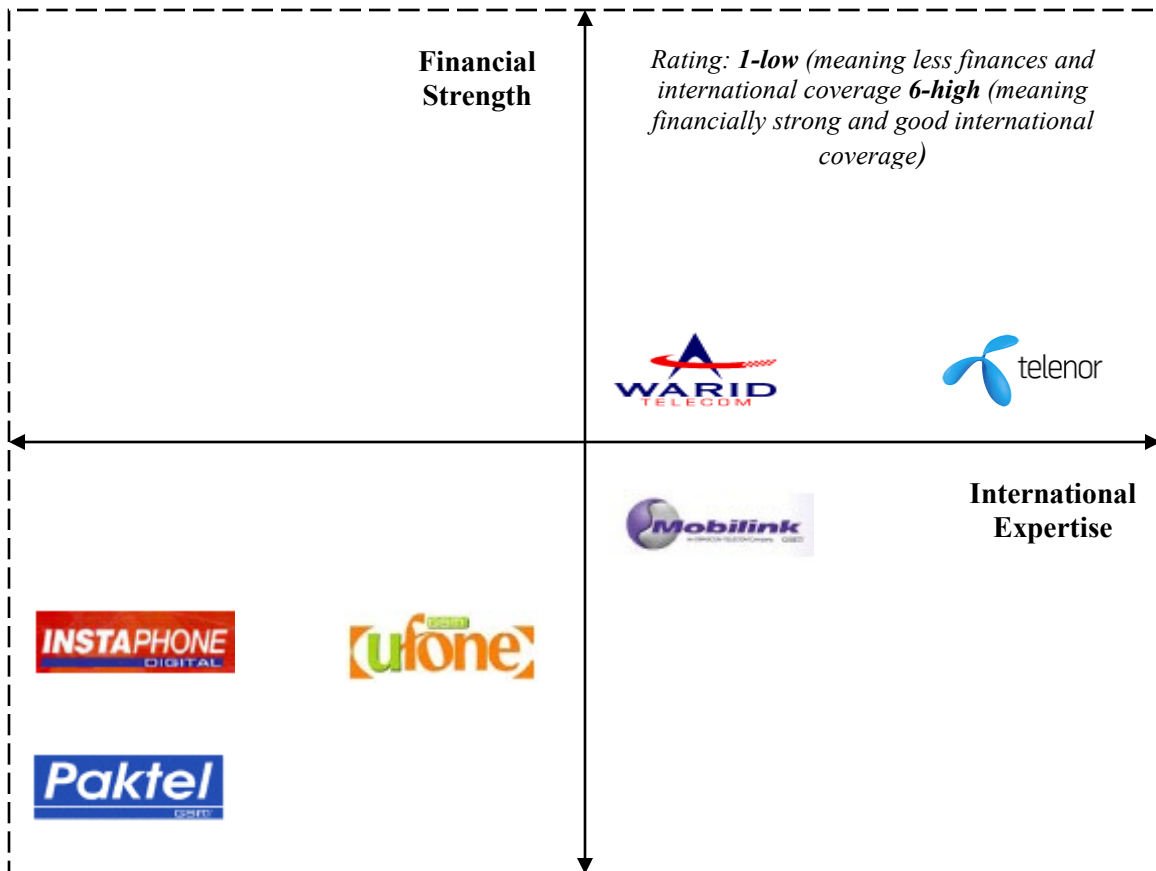
The year 2005 saw two brand new GSM operators creating their niches in the market. The launch of these services was awaited, with everyone wanting to see what the foreign operators could bring to an already crowded market place. Warid is backed by the Abu Dhabi Consortium of Sheikh Nahayan Mabarak Al Nahayan. Telenor, is backed by the Norwegian Telenor group. Both these companies are financially secure. Paktel was a joint venture between Cable & Wireless and Hassan Associates. C&W later sold out due to losses in operations and network closures in Karachi. Paktel was taken over by Millicom, which also controls Instaphone. Instaphone and Paktel, both are not making enough profits to ensure financial stability. Mobilink, started as a joint venture of IWC, Motorola and Saif Group in 1994 with GSM digital technology. Foreign partners later

sold out and now Mobilink is a subsidiary of Orascom. Mobilink has a dedicated group of scribers because of which it has been able to accumulate huge profits. Ufone is a subsidiary of PTCL; it is relatively strong on both dimensions.

4.5.4 Positioning Statements of the Major Players:

✓ **Telenor**
Enter the world of Telenor and become part of the fastest growing cellular network which is also the largest data network of Pakistan. Telenor is here to satisfy your needs, so, keep enjoying the attractive products and services and remain connected to your loved ones everywhere. Share and experience a network with a difference in your city.

✓ **Ufone**
A connection that provides the largest range of value added features at lower costs, providing excellent connectivity and single pricing so that there is no confusion only solutions coupled with excellent coverage.

✓ **Mobilink**
The largest cellular company in Pakistan , combines fun with value, especially targeting people young at heart, business executives, the youth and of course the Ladies of the house. Mobilink offers lower rates to three favorite numbers, so be part of the largest network in Pakistan offering the widest coverage.

✓ **Warid**
Warid offers convenience and clear cut pricing with no hassles. Communicate within the Warid family at lower rates, a service that provides easy commutation facilities in order to communicate with friends and family.

✓ **Paktel**
The first mobile phone company in Pakistan offers lower prices within its network with acceptable coverage and connectivity to help you stay in touch with others whenever required. It is a brand that understands your needs and speaks to your mind and heart.

✓ **Instaphone**
Get connected to Instaphone digital, offering you lower rates to other networks. Offering free Sms from Insta to Insta is definitely an economical option as compared to any other tariff plan. The advantages are obvious immediate access to main nationwide and international dialing without any security deposits, no line rents and no monthly bills. The product is the simplest way to budget communication cost

4.5.5 Market Share:
Considering the perceptual maps that were drawn above, the market shares can be calculated for the players in the industry and this defines the relative position of the company in the market. On the other hand, growth rate is determined by analyzing certain factors of the industry. Following are the market share calculations:

Table 13: Market Share Calculations (I)

Attributes	Weighted Index	Rating Scale					
		Mobilink	Ufone	Telenor	Warid	Paktel	Instaphone
Customer care	0.05	4	1	5	5	1	2
Connectivity	0.15	2	3	3	5	2	2
Price	0.15	1	5	2	4	5	2
VAS	0.05	4	5	4	3	1	1
Quality	0.15	3	4	5	5	2	1
Coverage	0.15	6	3	2	2	1	4
Brand rep	0.05	6	3	5	4	2	1
Promotions	0.05	5	2	6	3	1	1
Finances	0.05	3	2	4	4	1	2
Intl expertise	0.15	4	3	6	4	1	1
Total	1						

Table 14: Market Share Calculations (II)

Attributes	Weighted Index	Rating Scale					
		Mobilink	Ufone	Telenor	Warid	Paktel	Instaphone
Customer care	0.05	0.2	0.05	0.25	0.25	0.05	0.1
Connectivity	0.15	0.3	0.45	0.45	0.75	0.3	0.3
Price	0.15	0.15	0.75	0.3	0.6	0.75	0.3
VAS	0.05	0.2	0.25	0.2	0.15	0.05	0.05
Quality	0.15	0.45	0.6	0.75	0.75	0.3	0.15
Coverage	0.15	0.9	0.45	0.3	0.3	0.15	0.6
Brand rep	0.05	0.3	0.15	0.25	0.2	0.1	0.05
Promotions	0.05	0.25	0.1	0.3	0.15	0.05	0.05
Finances	0.05	0.15	0.1	0.2	0.2	0.05	0.1
Intl expertise	0.15	0.6	0.45	0.9	0.6	0.15	0.15
Total	1	3.5	3.35	3.9	3.95	1.95	1.85

Based on the above calculations the following market share is owned by each competitor:

✓ **Warid**   **3.95**
✓ **Telenor**   **3.9**
✓ **Mobilink**   **3.5**
✓ **Ufone**   **3.35**
✓ **Paktel**   **1.95**
✓ **Instaphone**   **1.85**

4.5.6 Market Growth:
BCG matrix uses growth rate as the other factor of analysis besides market share because a growing industry is very important for a company. The market shares of the various cellular companies have been calculated, now the focus will be on market growth rate and the factors that foster that growth. The telecom sector is a profitable sector with so many initiatives being taken up by Pakistan Telecommunication Authority (PTA) and the government that a win-win situation exists for every one, the government is getting more revenues, consumers are getting wide choices and lower tariffs and investors are also earning profits. According to Muhammad Arif Sargana, there are several factors leading to the success of the telecom sector. First and foremost is the liberalization of the sector. Secondly, the industry is regulated by strong and effective regulator like PTA. Third important reason is the documentation of all rules, procedures and methods for awarding licenses and their publicity by the regulator through media, seminars and other sources. Lastly, the strong economic indicators of the economy, signaled strongly to foreign investors for investment in the country. These were just some of the factors, but PTA is also focusing on other aspects that will foster growth even further. (Muhammad Arif Sargana, 2006) (See exhibit # 5 in appendix for an article on factors behind telecom sector's success)

PTA is vigilant of the changing telecom markets and their challenges, and has made great efforts for timely and appropriate measures to continue the pace of growth in the sector. Simplified licensing regime, licensing in Azad Jammu and Kashmir and Northern Areas, mobile number portability and reduction in fees are few of the initiatives by the Authority for the uplift of the telecom sector in Pakistan. (Economic Survey, 2005-06)

4.5.6.1 New Licensing Regime:
In order to simplify the process of value added services licensing, PTA has introduced a new Class Value Added License (CVAL) regime. This incorporates more than 15 possible individual licenses, merged into two distinct license categories i.e. Data type and Voice type. The PTA has initiated to issue CVAL licenses since 20th October 2005 and has issued several licenses under the new regime. Besides, existing value added service licenses are being converted into new CVAL licensing. (Economic Survey, 2005-06)

4.5.6.2 Mobile Licensing in Azad Jammu and Kashmir and the Northern Areas:
The earthquake of October 2005 greatly damaged the telecom infrastructure of the Special Communication Organization (SCO) in the AJ&K and NAs region. Considering the dire need for telecom facilities in the earthquake relief operation, the Government granted temporary permission till April 13 2006, to all telecom service providers in Pakistan, to extend their services to these areas. Furthermore, the Government has decided on the provision of licenses to cellular mobile companies for their operation in AJ&K and NAs on a permanent basis. (Economic Survey, 2005-06)

In this regard, PTA has invited applications from the cellular mobile operators operating in Pakistan. Fixed telephone systems, on the other hand, are very costly in these mountainous regions. Therefore, the provision of cellular services will drastically increase the total teledensity of the area. Since the permission of telecom operators in

AJ&K and NAs, the cellular subscription has increased manifold i.e. the number of cellular subscribers in AJ&K have crossed 50,000 from a level of just 5000 in June 2005. With the licensing, this growth will be more profound and the people of AJ&K and NAs will also enjoy the modern and less costly telecom facilities. (Economic Survey, 2005-06)

4.5.6.3 Mobile Number Portability (MNP):

MNP enables the customers to change the operator/service while retaining the same mobile number. This creates competition in the market and provides healthy environment for the new entrants and better choices for the consumers. According to Cellular Mobile Policy, the mobile operators are required to provide the Mobile Number Portability (MNP). With the consultations of all the stakeholders, PTA prepared regulations and a strategic roadmap for the implementation of MNP. (Economic Survey, 2005-06)

All the issues have been addressed in consultation with the stakeholders. The implementation process however is still in its final stages. In addition, the central Pakistan MNP Database Company has been established to cater for the central data base requirements of the project. The concerned operators will be able to upgrade their exchanges in the next 6-7 months and their link will be established with the centralized database. Therefore, it is expected that the MNP regime will be implemented by the end of 2006. (Economic Survey, 2005-06)

4.5.6.4 Reduction in Fees:

Over the years, royalty on mobile operators was reduced from 1.5 percent to 0.5 percent of annual gross revenue minus inter operators payments. Additionally, PTA also reduced annual license fees of other value added services. Satellite services fee and license requirements have been removed and only registration is required. (Economic Survey, 2005-06)

4.5.6.5 Reduction in Taxes/Duties:

The Government reduced the activation tax on new mobile connections from Rs. 2000 to Rs. 1000, which was further reduced to Rs. 500. Similarly, advance tax on prepaid cards that was charged at the rate of Rs. 125 has now been reduced to 9 percent of the value of the card. (Economic Survey, 2005-06)

4.5.6.6 Telecom Services Tariff:

The benefits of deregulation and liberalization process in the telecom sector of Pakistan are now being enjoyed by its people in the form of increased consumer choices, greater access; value added services and affordable prices. The intense competition in all segments of the telecom sector has seen a significant decrease in the tariffs of various telecom services. The competition in mobile sector after the cellular mobile policy in 2004 and entry of two new mobile companies in 2005 resulted in a sharp decline in the call charges. (See exhibit # 6 in appendix for a complete list of tariffs) (Economic Survey, 2005-06)

The industry is expected to grow as PTA has carried out the necessary measures. The number of subscribers and the teledensity show tremendous levels of growth as well. The

overall density in the country has reached 23.1 percent at the end of April, 2006 which was only 2.3 percent in 1999-2000, therefore an increase of 21 percent. (Economic Survey, 2005-06) The growth rate in the number of subscribers was around 154.26 percent, in 2005 whereas now it is 170.2, which shows as increase of 16 percent. To make it simple, 20 percent growth rate is used for the growing cellular industry. All the six companies are lying in the upper two quadrants of the matrix. Following is the growth-share matrix illustrating each companies calculated market share. (Economic Survey, 2005-06)

Figure 24: Growth-Share Matrix of Cellular Companies

Mobilink	*M*	0.875
Ufone	*U*	0.8375
Telenor	*T*	0.975
Warid	*W*	0.9875
Paktel	*P*	0.4875
Instaphone	*I*	0.4625

Assumed Growth Rate of Industry: 9%
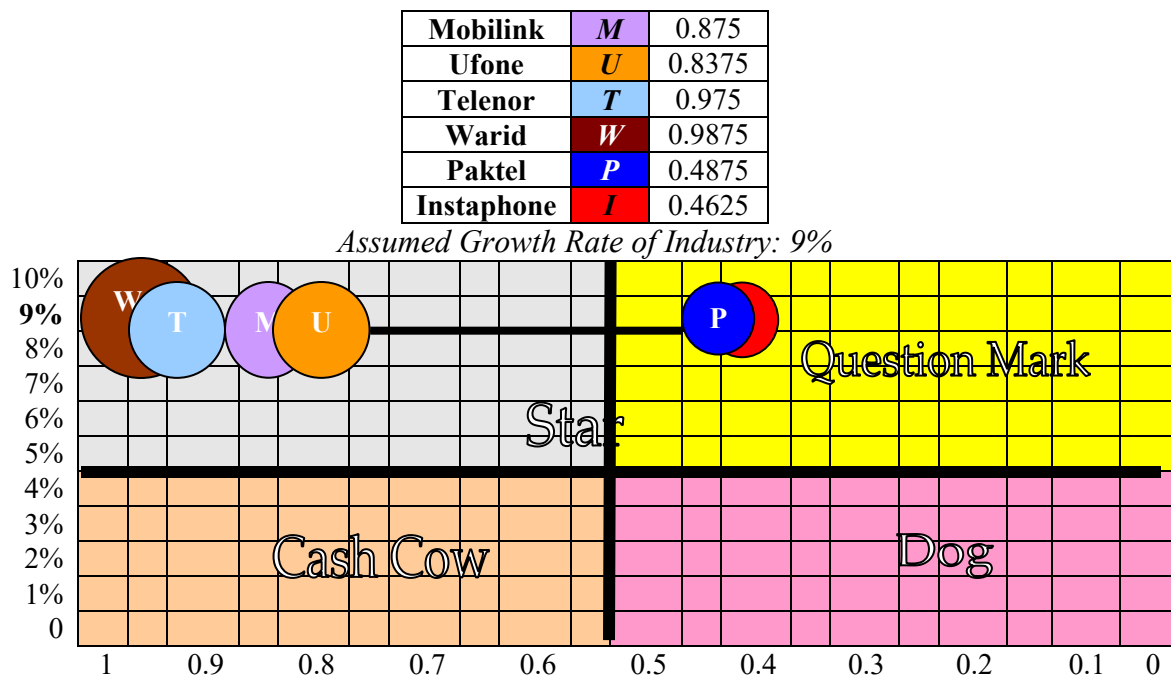
Warid, Telenor, Mobilink, Ufone and Paktel are all Stars at the moment since the industry is at the climax of its growth stage in Pakistan. Telenor and Warid were the last to enter the industry in 2005 but both companies have developed themselves in just a short period of time that they are giving Mobilink and Ufone a run for their money. Mobilink is continuously introducing new set of services and packages and it keeps on advertising to maintain brand awareness. Warid is also in the star category primarily due to the fact that it has a higher market share in comparison to Telenor, Mobilink and Ufone. Warid has been able to firmly place itself in the market due to its low net prices. Warid has been able to fully understand the usage pattern of Pakistanis. Instaphone is in the problem child category because in comparison to others its market share is comparatively low. Paktel was basically launched in Pakistan on the Amps network but now is on GSM. Paktel has not been able to offer much to its customers and that is the reason for its low market share. People at times have problems with the connectivity of Paktel and also its rates were not low enough where as now it has gone to 1 second billing like Warid and hence is a Star at the moment. Instaphone has remained quiet for some time and has not been advertising like other cellular companies.

4.5.7 Market Segmentation:

Market segmentation is used to better classify and understand customers according to their characteristics. Each segment consists of people with similar needs and characteristics that lead them to respond in a similar way to a particular product/service offering. Most of the cellular companies have targeted the same set of customers; they may be differentiated on the basis of the product package that each company offers. The most common basis of segmentation is demographic; in which customers will be classified based on their social class. The lifestyles of cellular consumers can be determined by developing an AIOD framework that will help determine the benefits people want from cellular services.

Figure 25: Demographic Segmentation of Cellular Companies
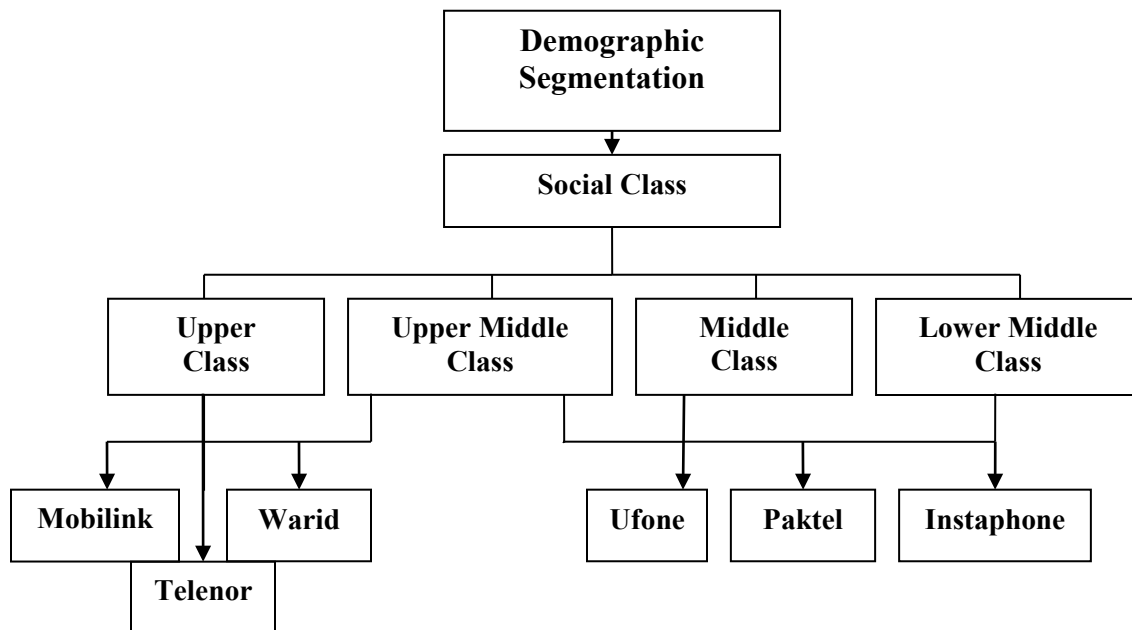
Mobilink, Telenor, Warid, Ufone and Paktel are all targeting customers through their advertising campaigns. Mobilink is targeting a diverse group of people, from individuals to businessmen to corporate and multinationals. Even youth and ladies are being targeted through Ladies first and Jazz packages. The social class is depicted in each advertising campaign and this is how companies are able to position themselves in the mind of the right target audience. Mobilink, Warid and Telenor are penetrating the high society whereas Ufone and Paktel are going to the lower segment where most of the population is residing.

Mobilink, Warid and Telenor are targeting the upper class and upper middle class segments. Their advertisements show their target market. Similarly Ufone, Paktel and Instaphone advertisement show their target market as well. The intense competition in the industry has led to price wars where companies like Warid and Paktel have gone to 1

second billing. Even though the price is less, the image of the company in the mind of consumer is that of high class and prestige because they are offering services to the business executives, youth and now even ladies of the house. The way they have positioned themselves is defining the social class each company is targeting. Following are the type of customers cellular companies are targeting

These segments have been targeted by Ufone, Mobilink, Warid, Telenor and Paktel because these are the potential customers who can be convinced to use the service through their marketing campaigns. Executives are businessmen of all categories and also the employees of various government and private sectors, who use the mobile phones for business and work needs. These people are the heaviest users of mobile phone service, and from this segment, most of the cellular companies get their revenues. The female population of Pakistan may it be the house wives or belonging to any other category, they also use they use mobile phone mainly to stay connected and be accessible at any place and at any point in time. Each company is targeting the youth of Pakistan. Telenor is doing it through djuice, Ufone through Prepay, Mobilink through Jazz, Paktel through Talk Free and Warid through its new Zem prepaid packages. Youngsters of Pakistan also do not like to stay behind. Youngsters using mobile phone service are normally college and university students who use the connection to stay in touch with their family and friends.

Figure 26: Potential Segments
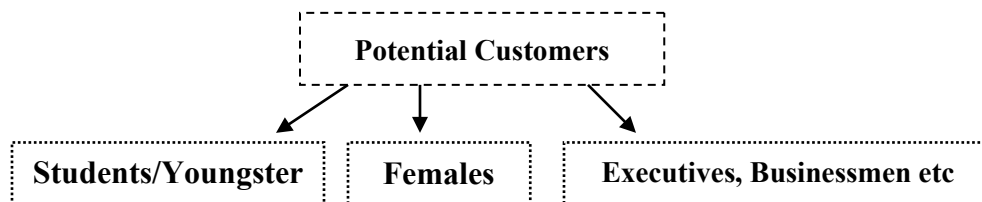
Most of the cellular companies have classified their potential customers in three major categories. Companies are providing various prepaid and postpaid packages targeted for each segment and are advertising extensively to attract these segments.

4.5.8 Consumer Profile:
Consumers demand a lot from a mobile phone connection. Mobile companies have identified various needs and benefits that have been highlighted through advertisements which will compel consumers towards buying a connection. The most important of those needs that have been identified in the adverts is the need to stay ***connected***, which is the basic need for any mobile phone user. By getting a connection, one will always be connected and accessible to others. The second benefit that has been highlighted through cellular adverts is the ***affordability*** of packages. People belong to various social classes and some cannot easily afford to keep a connection. Most of the mobile companies have added certain discounts or even reduced their tariff charges to cater to such customers. Each company has come up with a variety of prepaid packages to cater to different social classes.

Some of advertisements whether print, electronic or outdoor also highlight the benefit of a *wider network,* by showing various destinations. One reason why people would choose a particular mobile phone connection may be because of their family members or friends using the same connection. The issue of *group acceptability* also arises. Since consumers decision related to choosing products is hugely affected by their reference groups. Consumers like to relate and associate themselves to things their friends and family approve off and also those things that are fashionable in the eyes of society. The need for *extra value added features* is something that is highlighted in various print advertisements. All mobile phone companies are providing a variety of services like SMS, GPRS, MMS, WAP, greetings, wallpapers and ring tones etc. Customers also demand that the *quality of service* should be really good. Even though Mobilink has an extensive network still the networks gets jammed and people are not able to make calls. Mobile companies have realized this aspect and are providing customer service incase a problem occurs also they are introducing new prefixes along with new technology to avoid the getting the network jammed.

Table 15: Cellular Consumer Profile

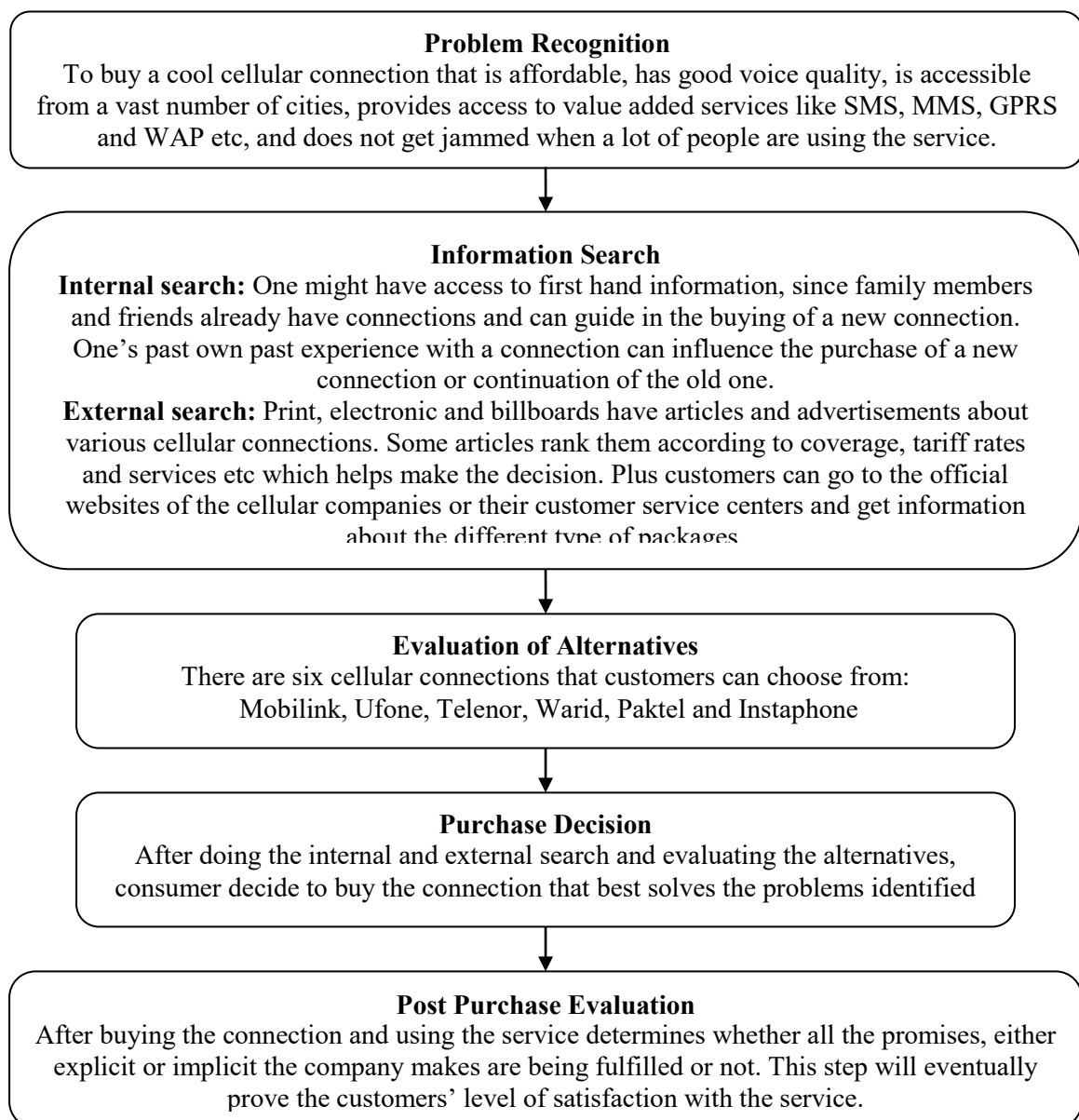| Benefits	Activities	Interests	Opinions	Demographics
Affordability	Business Professionals Managers Students Housewives	Sports Community Social Gatherings Entertainment Lovers	Energetic Self Actualization Peer Pressure	16-45 yrs Single, Newly Married, Full Nest. Light-to-Medium
Quality of Service/Good level of connectivity	Businessmen, Working professionals, executives Working Women	Sports, Food, Media, Entertainment, Recreation	Ambitious, Energetic, Education Themselves	35- 55 yrs old, Married, full nest, I, II, III, Light-to-Medium
Extensive network/ greater coverage	Business Professionals Managers Sportsmen Students	Sports Community Social Gatherings Entertainment Lovers	Strong Views about Products Group Association	15-45 yrs Single, Newly Married, Full Nest. I, II, III
Extra value added features	Business Professionals Corporate Executives Managers Sportsmen	Sports Community Social Gatherings Entertainment Lovers	Education Ambitions Current issues	22-40 yrs Single, Newly Married, Full Nest, I, II, III, Light-to-Heavy
Socially Acceptable/In Fashion	Business Professionals Managers Students	Sports Community Social Gatherings	Energetic Self Actualization Peer Pressure	16-45 yrs Single, Newly Married, Full Nest. Light-to-Medium

4.5.9 Consumer Decision Making Process:

The ideal consumer decision making model is one in which the customer goes through all the steps and makes a purchase in the end. The parties that are actively involved in the decision making process are: first the decision maker himself, than his/her parents and family, friends/peer group and of course the media, which is a potential source of relevant information. The attitude sequence involved in buying the connection would be:

$$\text{Cognitive} \rightarrow \text{conative} \rightarrow \text{affective}$$

This is a high involvement service, since an individual has to use the connection to make calls on a daily basis. As a consequence, in the initial stage all the available alternatives are carefully considered, subsequent to which action is taken i.e. the connection is bought by the person who than starts to experience the service and develop feelings for it.

Figure 27: Decision Making Process

Problem Recognition
To buy a cool cellular connection that is affordable, has good voice quality, is accessible from a vast number of cities, provides access to value added services like SMS, MMS, GPRS and WAP etc, and does not get jammed when a lot of people are using the service.

↓

Information Search
Internal search: One might have access to first hand information, since family members and friends already have connections and can guide in the buying of a new connection. One's past own past experience with a connection can influence the purchase of a new connection or continuation of the old one.
External search: Print, electronic and billboards have articles and advertisements about various cellular connections. Some articles rank them according to coverage, tariff rates and services etc which helps make the decision. Plus customers can go to the official websites of the cellular companies or their customer service centers and get information about the different type of packages

↓

Evaluation of Alternatives
There are six cellular connections that customers can choose from:
Mobilink, Ufone, Telenor, Warid, Paktel and Instaphone

↓

Purchase Decision
After doing the internal and external search and evaluating the alternatives, consumer decide to buy the connection that best solves the problems identified

↓

Post Purchase Evaluation
After buying the connection and using the service determines whether all the promises, either explicit or implicit the company makes are being fulfilled or not. This step will eventually prove the customers' level of satisfaction with the service.

4.5.10 Advertisement Analysis of Telenor Talkshawk
Telenor Talkshawk launched television and print ads as well as billboards for its promotion at a mass level. Following is the Telenor ad displayed on Airport Road. Telenor has placed three Talkshawk billboards one at Airport Road, the second at Kachary Chowk and the third on top of Habib Bank in Saddar, Rawalpindi.

Figure 28: Billboard of Telenor Talkshawk

4.5.10.1 Description of Text, Layout and Color of the Advertisement:
In the advertisement the name of the package is written in top left corner of the billboard which is *'Telenor Talkshawk prepaid package,'* at the opposite end is the company logo. There is no tagline, except for some text that explains the main benefit of the package which is *'2 Friends and Family numbers on any network; Rs. 0.50 for Telenor to Telenor and Rs. 1.00 for Telenor to other network.'*

The visual comprises of pictures of two well-known celebrities; Ali Zafar (singer) and Sonia Jehan (actress). On the right side of the billboard, Sonia Jehan is holding a mobile next to Ali Zafar's ear. The text, logo and images stand out against the white canvas. Pink and blue; are the two colors that add dept to the billboard and highlight the message.

Colors have symbolism and meanings that go beyond ink. As companies design brochures, logos, and web sites, it is helpful to keep in mind how the eye and the mind perceive certain colors and the meanings people associate with each color. Blue is the color of Telenor's logo which is highlighted in its Smart Call advert as well. Blue is the color of the sky and sea. It is often associated with depth and stability. It symbolizes trust, loyalty, wisdom, confidence, power, intelligence, faith, truth, and heaven. Pink on the other hand signifies love, friendship, compassion, relaxation. Pink is symbolic of gentle emotions and is often associated with femininity. It symbolizes good health as well.

Good advertisement design saves time and money and builds goodwill. A well designed ad looks inviting, friendly and easy to read. The layout of the ad is reasonably appealing. The visual stands out at first, than one notices the text written on the left of the billboard. Ali Zafar and Sonia Jehan are very popular now-a-days, so both of them have been blown up in size to grab the audiences' attention. Telenor places the most important information in the ad regarding the lower call rates from Telenor to Telenor and other networks. The package's name is printed in big font; everything is legible except for a condition that says *'CED applicable,' 'per 30 second charge.'* The brand name and logo are clearly visible. Different shades of colors are used in harmony with each other to give a friendly and healthy look.

4.5.10.1.1 FCB Grid:

	Thinking	Feeling
High Involvement	telenor	
Low Involvement		

Telenor has been perceived to be a high-involvement product. The reasons for this categorization are mainly that the nature of product is such that prior to selecting the vendor, individuals perform research related to connection quality, prices, available packages and services. Every potential mobile user seeks information from friends and other available sources and then decides on the best available option based on priorities. Although, the initial cost of product is low, the switching costs are high since every time an individual changes his/her connection, all the existing contacts have to be informed of the new number. The advertisement too possesses the characteristics of a high involvement product.

1. **Choice of media:** This advertising campaign is running on all three mediums i.e. print, electronic and outdoor. Huge billboards around 30x90 feet have been erected alongside Airport Road and at Kachary Chowk.

2. **Purpose:** Since it is the first Talkshawk advertisement, it is informing consumers about the package and its major benefits. Therefore it is creating awareness and persuading consumers to buy the product.

3. **Message strategy:** The message strategy is *generic*. Talkshawk advert is making no comparisons or claims of superiority. It is simply telling the consumer about the service.

4. **Appealing techniques:** The music appeal is very difficult to execute but the jingle of Talkshawk says everything. The jingle has increased the retention of the visual information.
5. **Executional technique:** The executional framework is 'Slice of life.' It is portrayed a dilemma of high price and Talkshawk is the solution if one wants a connection at lower rates.

6. **Hierarchy of Effects:** The sequence that the billboard is promoting is first *cognitive;* for customers to develop awareness and knowledge of the service, than *affective*; develop a liking and preference for the service through the musical appeal and visual images and finally *conative;* to make the actual purchase after thoughtful consideration of the various benefits explained through the jingle.

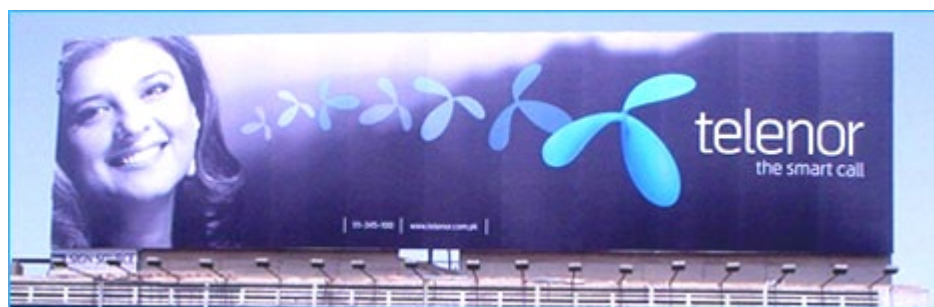**4.5.11 Advertisement Analysis of Telenor:**
This particular billboard is promoting the Telenor post paid connection. It was displayed sometime back on Airport Road, when Telenor launched the new packages. There are three more versions of this billboard since there a total of four postpaid packages as shown in the figure below. The only thing that changes in the billboards is the person endorsing that package.

Figure 29: Telenor Post Paid Packages
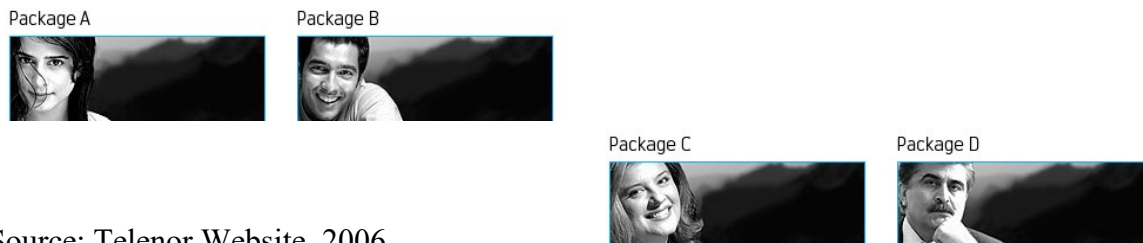
Source: Telenor Website, 2006

Figure 30: Billboard of Telenor Post Paid

4.5.11.1 Description of Text, Layout and Color of the Advertisement:
At the heart of this advertisement is the brand new logo of Telenor. It is a symbol of balance, movement and change. It represents Telenor's philosophy of innovation and democratic process and takes its inspiration from Scandinavia's long history of design inspired by nature. There is no text in terms of tagline or package details given on the billboard except for the name of the brand which is *'Telenor-the Smart Call.'* The only visual is the image of Marina Khan (actress) on the left of the billboard and right next to

her is the Telenor logo that is faded but when it slowly moves to the right of the billboard, next to the name of the brand, the logo is in bright blue color. All this is against a black and partially grey canvas, which give an impression of mountains and sky in the backdrop.

The main colors of this billboard are blue and black. The logo of Telenor is blue in color which shows the tranquility and calmness. It also shows an element of sincerity that Telenor is loyal and sincere in serving its customers. Blue is usually used to promote products and services related to cleanliness, air, sky, water and sea. As opposed to emotionally warm colors like red, orange and yellow; blue is linked to consciousness and intellect. Black is associated with power, elegance and formality. Black denotes strength and authority; it is considered to be a very formal, elegant, and prestigious color. Black gives the feeling of perspective and depth. It is best to use a black or gray background to make the other colors stand out. Black contrasts well with bright colors. Combined with red or orange or other very powerful colors, black gives a very aggressive color scheme.

The billboard is really different and demands attention. It stands out from the crowd. Its impact level is high because any one passing by will be able to comprehend the message immediately that Telenor has launched new packages and if people want to know more about it, they should log into Telenor's website.

This may be true for the time being but not many people actually remembered the advertising campaign on billboards. Consumers remember Talkshawk but not this billboard because first of all the billboards were not complementing the advertisements on television since neither of the package endorsers were in the commercial. The reason being that the advertisement was a corporate one telling consumers that Telenor has changed its positioning. So, many people were confused as to what the billboard is trying to convey. Some people assumed that Telenor has now changed its name to Telenor Smart Call and thought that this was a corporate billboard too. Consumers are more prone to advertisements of Mobilink Indigo or Jazz where the information about the package is delivered loud and clear.

4.5.11.1.1 FCB Grid:

	Thinking	**Feeling**
High Involvement		
Low Involvement		

People usually think that buying a mobile connection is a low-involvement purchase since costs have reduced but in reality that is not the situation. Consumers still have to do a lot of research before they actually buy the service. Most of the mobile companies have introduced so many packages each with a different benefit than the other and most connections have hidden charges that are not known unless the service is used, therefore all mobile connection services are high involvement purchases.

This particular billboard of Telenor will be placed in the second quadrant, the reason being that the billboard does not give any detail about the package; it just tries to elicit one's emotions and feelings of happiness and curiosity because once people see the billboard, they want to know more about it. Instead of giving details about the package, Telenor has kept it simple and plain. The advertisement is a picture and as people say that pictures speak a thousand words, therefore it can be interpreted differently by each person. The end result would be that people would want to know more about the post paid package and would go to Telenor's website or call customer services to learn about it.

1. **Choice of media:** This advertising campaign is running on the electronic medium but there are not that any billboards of this package displayed in Rawalpindi or Islamabad. Huge billboards around 30x90 feet had been erected at Roomi Park in Rawalpindi when the campaign was launched three or four months ago.

2. **Purpose:** It is the first Smart Call advertisement; but it is not informing consumers about the package and its major benefits but is increasing awareness and enhancing the image of the brand as the best option for the business people of our corporate world. It is creating awareness and persuading customers to learn more about Smart Call.

3. **Message strategy:** The message strategy is affective with a focus on emotional advertising but this strategy shines through in the commercial shown on television but on billboards the *brand user,* strategy is used. Smart Call billboards actually show the type of individuals that can use this particular service. The four packages endorsed by different faces tell the individual what type of package would be best suited to their needs. For example if the consumer is in his 50's and is an executive of a corporation than Package 'D' would be the best option for him since he can afford to pay a line of Rs. 1500.

4. **Appealing techniques:** The emotional/musical appeal is used in the television advertisement. The musical score runs through out the commercial and explains emotions as it goes from one person to the next. Although this appeal is not as such vision on the billboard but feeling of prestige and upper class is quite obvious from the billboard. The retention aspect is the visual image of Mehreen Raheel, Marina Khan or Jamal Shah.

5. **Executional technique:** The executional framework is 'Slice of life.' It is portrayed by showing individuals in their daily life facing a problem and 'Smart Call' connection provides the solution for them.

6. **Hierarchy of Effects:** The sequence that the billboard is promoting is first *affective;* for customers to develop a liking and preference, than cognitive; since consumers would like to learn more about the rates and services etc offered with each package. The last step is conative; that is for consumers to make the actual purchase after they are sure that the package will satisfy their need.

4.5.12 Advertisement Analysis of Warid:

Warid recently launched six Zem prepaid packages. It is advertising all the six packages in one print advertisement. (See exhibit # 7 in appendix for Warid's print advertisement) Warid is not doing any extensive advertising on television like Mobilink or Telenor but Warid's advertisements are running on the electronic media as well. The following billboard is for the Zem 321 Countdown package, which is displayed in front of the Jinnah Park, where McDonalds recently opened its first franchise in Rawalpindi.

Figure 31: Billboard of Warid's Zem 321 Countdown Package

4.5.12.1 Description of Text, Layout and Color of Advertisement:

In the above advertisement the name of the package is displayed right in the middle. The model is on the left hand side and the headline of the advertisement is written on the right hand side of the billboard. The logo of the parent company that is Warid is printed on the lower right corner of the billboard which is not quite visible in the above picture. The name of the package is displayed in rectangular box with '*Zem*' written first in white lower case letters, in the next line is *'321'* in black and *'countdown,'* is in upper case letters, in white color against a black backdrop.

The visual, text and package name are displayed against a white canvas. The different variations of pink clearly stand out and ask for attention. The headline; *'The more you talk the less you pay,'* says it all in just eight words. This leaves quite an impact on consumer. Splendid pinks have been delicately incorporated into the trend offering. Pink is associated with royalty. It symbolizes power, nobility, and ambition.

Warid is keeping its advertising expenditure to the bare minimum by not indulging in extensive marketing. This is the only billboard of Warid displayed in the whole of Rawalpindi that explains one of its Zem packages, yes there are small neon signs on Murree road and a billboard of Independence Day on Airport Road but they are next to nothing that consumers would notice and remember. Warid is relying on word-of-mouth since it is providing exceptional service at lower rates than the rest of the competitors.

4.5.12.1.1 FCB Grid:

	Thinking	Feeling
High Involvement		
Low Involvement		

Warid has been put in the category of a high involvement product and the thinking quadrant. Since it is a new advertisement, it is informing customers about the main benefit of the package which the more one talks, the cheaper the call gets. The main benefit of the package is stated and it makes quite an impression as it gets the consumer to think what other benefit this package is offering.

1. **Choice of media:** This advertising campaign is running on the electronic medium as well as the print and now the outdoors. There are total of six packages but only Zem 321 was given the privilege to grace a 30x90 billboard.

2. **Purpose:** The main of this all campaign is to inform consumer about the Zem prepaid packages. The billboards are doing just that by getting consumers to reflect on the given information. The purpose can also be to persuade the customer to take action since consumer want connections at cheaper rates.

3. **Message strategy:** The message strategy is *generic* the same as Talkshawk advertisement. It is also one of the reasons why the billboard was placed in the first quadrant.

4. **Appealing techniques:** Warid has gone for the rational appeal as this helps consumers make the final decision. A rational appeal focuses on giving consumer information that will persuade them to make a switch to the new package.

5. **Executional technique:** The executional framework for the ad both in print, electronic and outdoor media is, informative. Warid has not gone for fantasy, demonstration, testimonial or other types of frameworks since this is the best framework to execute a rational appeal.

6. **Hierarchy of Effects:** The sequence that the billboard is promoting is first cognitive, than affective and lastly conative. Since consumers will gather knowledge and if they prefer it to be better than they will eventually buy it.

4.5.13 Advertisement Analysis of Ufone:
Ufone is not currently advertising heavily like Telenor or Mobilink on television and in newspapers because it has not launched a new campaign but advertisements of 'Prepay' are running on all three mediums to act as a reminder and reinforce the message of the brand. Ufone is now advertising to develop a relationship with the customer and promoting an upbeat and chic personality that will help the target audience associate themselves with Ufone.

A billboard of Ufone can be spotted at the TM chowk, which is considered a prime location under the policy of Rawalpindi Cantonment Board. This particular billboard acts as a prompt for the audience that Ufone call rates are relatively low and that it is a connection for everyone. Ufone changed its image from an Awami connection to connection for the young generation of Pakistan. But this advertisement shows all its potential customers that are young but they are in different phases of the family life cycle. This billboard shows businessmen, ladies, students and young adults.

Figure 32: Billboard of Ufone

4.5.13.1 Description of Text, Layout and Color of Advertisement:
The ad shows text and visuals on a white backdrop laced with orange circles. Orange and lime green are the colors of Ufone logo. The tagline is written in orange color with the

word *'u'* in green. Ufone logo is displayed at the bottom of the billboard amidst an orange strip.

The visual is very attractive as nine different people are shown lounging on the sofa either alone or with a friend. On the extreme left is a female sitting casually and talking on the phone, than a couple is shown listening to a phone conversation. The other four individuals are students and finally a father dressed as a business executive is sitting with his little girl and talking to her. This visual is right in the middle of the billboard. Besides the tagline, there is some right below the image, which states:

Call @ Rs. 1/min, 4 Ufone numbers & 1 PTCL number, any where in Pakistan.

The world *'call'* is in orange color but is in bold to attract attention *'@ Rs. 1/min'* is all in black and even the *'4'* and *'1'* are in written in black, whereas the rest of the text is normal typeface and in orange color.

Orange combines the energy of red and the happiness of yellow. To the human eye, orange is a very hot color, so it gives the sensation of heat. It is highly accepted among young people. In heraldry, orange is symbolic of strength and endurance. Orange has very high visibility, so the companies can use it to catch attention and to highlight the most important elements of their design or of a particular area of their promotional campaigns.

4.5.13.1.1 FCB Grid:

	Thinking	**Feeling**
High Involvement		[ufone]
Low Involvement		

Getting a mobile connection requires a lot of effort on part of the buyer as the level of competition is high in the industry. He/she goes through the entire decision making process and does a lot of external and internal search before finally making a purchase. This particular Ufone advertisement exudes a lot of emotions from the audience. The advertisement is very close to everyday life of the individual consumer to whom the company is targeting. The advert is first arousing the consumer's emotions than if or she likes the advert, the consumer will learn about it more from other sources and finally make a purchase.

1. **Choice of media:** All the three major mediums are showing Ufone advertisements. This billboard is built on the premises of Flashmans Hotel and this is a prime location, where a huge 30x90 feet steel structure hosts various Ufone adverts.

2. **Purpose:** The purpose is to reinforce the main message, which is to state the major benefit of the package. These advertisements are geared towards enticing other potential new customers who are buying a new or switching from an old connection.

3. **Message strategy:** The strategy affective with a focus on resonance advertising, since the ad attempts to connect the service with consumer's everyday experiences be it talking, hanging out with friends and family members.

4. **Appealing techniques:** The advertising appeal used for this is emotions. This blends well with the message strategy that has been employed to reach out to consumers.

5. **Executional technique:** The executional framework is slice-of-life. The nine people are shown doing every day things that consumers would normally do in their daily life. This aspect makes it more real and can get consumers emotionally involved in understanding and than eventually buying the service.

6. **Hierarchy of Effects:** The sequence this billboard is promoting is a little different since it is focusing on emotions and feelings therefore affective will come first than cognitive and lastly conative.

4.5.14 Advertisement Analysis of Mobilink Indigo:

Mobilink has been advertising and introducing new packages since Telenor and Warid entered the industry. Indigo replaced the postpaid package Mobilink Star when Mobilink changed its image. Mobilink advertisements are mostly displayed along Airport Road. Right behind this advertisement is the billboard of Jazz Ladies First as well. This advertisement is complementing a print advertisement that appeared in all major newspapers on 21st August, 2006. An incentive, Indigo Rewards Program is being promoted for customers who are current and potential members of Mobilink Indigo.

Figure 33: Billboard of Mobilink Indigo

4.5.14.1 Description of Text, Layout and Color of Advertisement:

The Indigo commercials have two major celebrities in it; one is Shaan (actor/director) and Zainab Qayyum (model/actress/host). Both of them have been appearing in every Indigo advertisement since the launch of Mobilink. Although initially, it was advertised as family connection but later the focus was entirely on the corporate executive. This billboard shows Zainab Qayyum on the left hand side and it seems as if she is entering a shopping mall, since the reward points on the card can be used for shopping in a store. The right side of the billboard has text written all over it the only lines that are legible from a distance are: *'Keep talking…Keep shopping with Indigo Rewards.'* Since this line is written against a purple backdrop, it stands out. The logo of Mobilink Indigo is in the lower right corner with a picture of the rewards card right next to it. The other text that is not legible is written in purple against the white backdrop, it basically explain the offer more; *'Earn and redeem reward points for instant buying power. A unique offer from Pakistan's favorite cellular family.'*

Purple combines the stability of blue and the energy of red. Purple is associated with royalty. It symbolizes power, nobility, luxury, and ambition. It conveys wealth and extravagance. Purple is associated with wisdom, dignity, independence, creativity, mystery, and magic.

Since this particular billboard is not displayed at a chowk, people can not read the copy written on it. Also the only thing that catches attention at first sight is the picture of Zainab Qayyum. The billboard should be located at a prime site, so it has more of an impact. On the whole, not a bad design and layout, except for so much of text that deters the customer from even reading the tagline.

4.5.14.1.1 FCB Grid:

	Thinking	Feeling
High Involvement		
Low Involvement		

This is a high involvement connection for corporate clients. The billboard is placed in the first quadrant since Mobilink Indigo just recently launched this particular incentive for its customers, so it is informing the customer and persuading them to use Indigo more.

1. **Choice of media:** Indigo rewards program advertisement is displayed in newspapers and on billboards.

2. **Purpose:** The purpose is to inform consumers about the new incentive and also to reinforce the main message that Indigo offers its clients everything they could ask for. This advertisement is also geared towards enticing potential customers who are buying a new or switching from an old postpaid connection.

3. **Message strategy:** The strategy cognitive with a focus on generic advertising, since the ad attempts to inform the consumer.

4. **Appealing techniques:** The advertising appeal used for this advert is rationality. Rational appeals are best when a company introduces a new service or package for customers.

5. **Executional technique:** The executional framework is slice-of-life. Since Zainab Qayyum is shown at the entrance of a shopping mall, this is something consumers do on a daily hence what better way to convey to the consumer that the rewards programs makes shopping more easier.

4.5.15 Advertisement Analysis of Jazz Ladies First:

Jazz recently launched a service especially for the lady of the house named 'Ladies First.' The billboard for this advert was first displayed at Kachary Chowk but then it was moved to much more appropriate location on Airport Road. The same billboard is also displayed at Pir Wadahai Chowk but on a 60x20 billboard. The structure is quite prominent from a distance and because of the colors; it stands out from the rest of the billboards displayed along Airport Road and on Pir Wadahai chowk

Figure 34: Billboard of Jazz Ladies First

4.5.15.1 Description of Text, Layout and Color of Advertisement:

The shape of the billboard is unique and different from the rest of the rectangular billboards. Sunita Marshal, the model/actress promoting the package is dressed in Red and is holding the package cover. She is on the right side whereas the text and logo is on the left side of the billboard. The logo, model and package name are the most prominent,

since 'Ladies First' is written in Italic and large font. The tagline is in quotations *'...aisay karti hoon!'* but the other text; *'Get beauty tips, cooking recipes, entertainment, shopping and discounted call rates!* is not that visible.

The color yellow and red both stand out. Yellow is the color of sunshine. It is associated with joy, happiness, intellect, and energy. Yellow produces a warming effect, arouses cheerfulness, stimulates mental activity and generates muscle energy. Bright, pure yellow is an attention getter. Red is the color of fire and blood, so it is associated with energy, strength, power, determination as well as passion, desire, and love. Red is a very emotionally intense color. It has very high visibility, which is why stop signs, stoplights, and fire equipment are usually painted red. In heraldry, red is used to indicate courage.

This advertisement has been designed well, keeping in mind the requirements of the new medium. Billboards need to be designed with minimum text and good visuals, in order to encourage recall and recognition; 'Ladies First' does just that. The recently launched packaged is informing customers of its benefits although they are not legible still the billboard supports other mediums and conveys the same message. (See exhibit # 8 in appendix for print advertisement of Jazz Ladies First)

4.5.15.1.1 FCB Grid:

	Thinking	**Feeling**
High Involvement		
Low Involvement		

The Jazz brand has branched out into a package designed specially to cater to the needs of the lady of the house. Since it is the first advertisement, therefore it is informing consumers about the features of the services. Consumers will first learn about the services, if they like them than they will go and buy the unique package.

1. **Choice of media:** Ladies first is appearing on the electronic, print and outdoor mediums. This billboard is situated right behind Mobilink's corporate package; indigo.

2. **Purpose:** The purpose is to create awareness for the brand and get consumers to try out the services for the first time.

3. **Message strategy:** The main strategy is preemptive meaning it is the first type of package that Mobilink has launched and the advertisement is saying that Ladies First provides all these benefits at discounted rates.

4. **Appealing techniques:** The advertising appeal used in the TV advertisement is musical but on billboard the appeal used is rationality as it is a new package.

5. **Executional technique:** The executional framework is informative. As the lady of the house is interested in cooking, entertainment and lower prices, every aspect is of interest in stated in the advertisement.

4.5.16 Functions and Type of Advertising by Cellular Companies:
Advertising is a type of communication that companies do to inform consumers about their products and services. Cellular companies are advertising immensely since there are total of six companies and each is offering the same generic service, only with subtle differences to add uniqueness to them.

Mobilink, Ufone, Telenor and Warid's outdoor campaigns have been analyzed. Paktel and Instaphone are not advertising in the mass medium as much and are losing market to the four major competitors of the industry. Mobilink, Ufone, Telenor and Warid are all doing *consumer advertising* since they are offering services catered specially to the needs of the individual consumer. Since these companies are operating in Pakistan, they are advertising *nationally*. There is no regional or local advertising as it is very expensive plus on they are targeting the masses and the generic need of every consumer, which is to communicate. All *three major medium* are primarily used by cellular companies since each medium is accessible to every household and individual consumer. The purpose of the advertising is generally the same. Every company is doing product and commercial advertising because they want to sell their products and services and earn a profit. Although direction action advertising is more appropriate but cellular companies are focusing more on *indirect-action advertising*. They are boosting the company's image and explaining service benefits to induce customers to ultimately make a purchase.

Generally there are six functions of advertising. Companies can do either one of them or focus on may be two or three simultaneously. This is more appropriate at times because in the end companies are trying to achieve all six aspects of advertising in one way or the other. Cellular companies advertise because of the four stated functions:

✓ To differentiate their service offer from the rest of the competitors
✓ To communicate their offering to the target audiences
✓ To increase the use of their service or encourage first time purchase
✓ To increase brand loyalty by reminding customer of the benefits

Mobilink is advertising Ladies First and Indigo, by focusing on all four of them. The same goes for Telenor Talkshawk, Warid's Zem as well as Ufone Prepay. Since all these companies are providing the same generic service that is a mobile connection, they are differentiating it on the basis of target market and the extra value added service with that package. All companies are advertising because they have to communicate these offerings to the target audience, so they will know the reason behind mobile company's existence and buy their services. Since there are so many varieties available, each

company is also focusing on developing a relationship with the customer and trying to retain them and increase their loyalty towards their brand.

4.5.17 Communication Phases and Advertising Goals of Cellular Companies:
There are six communication phases in advertising starting from awareness (inform consumers), than comprehension (tell the benefits), acceptance (it meets their needs), preference (give an extra incentive), ownership (call to action) and finally reinforcement (make another purchase).

Consumers may be at a different phase but companies have to advertise as such that each phase is communicated to the target audience. When a new service is introduced it has to go through each of the phases. Ladies First, Talkshawk and Zem are all creating awareness, telling consumers of the benefits and making them realize that this will satisfy their need and than persuading them to make a purchase. The preference phase may not be that obvious from the advertisement but it can be if a company is offering something for free or as a gift with the package.

Ufone and Mobilink, since they have in the market longer than Telenor and Warid are also communicating the phase of reinforcement, by reminding consumer again of the benefit of their service and giving them more options like now the Ladies First package and the Indigo Rewards program. There are three interim advertising goals, information, persuasion and reinforcement. Mobilink and Ufone are at the maturity stage, where as Telenor and Warid are at the competitive stage and this is in reference to the overall brand and not the individual packages and their advertisement. The reason being that all these companies have passed the early stage of awareness and familiarity as a company and are either at competitive stage or maturity stage, in terms of their advertising and their latest packages.

Figure 35: Advertising Goals of Mobilink, Ufone, Telenor and Warid
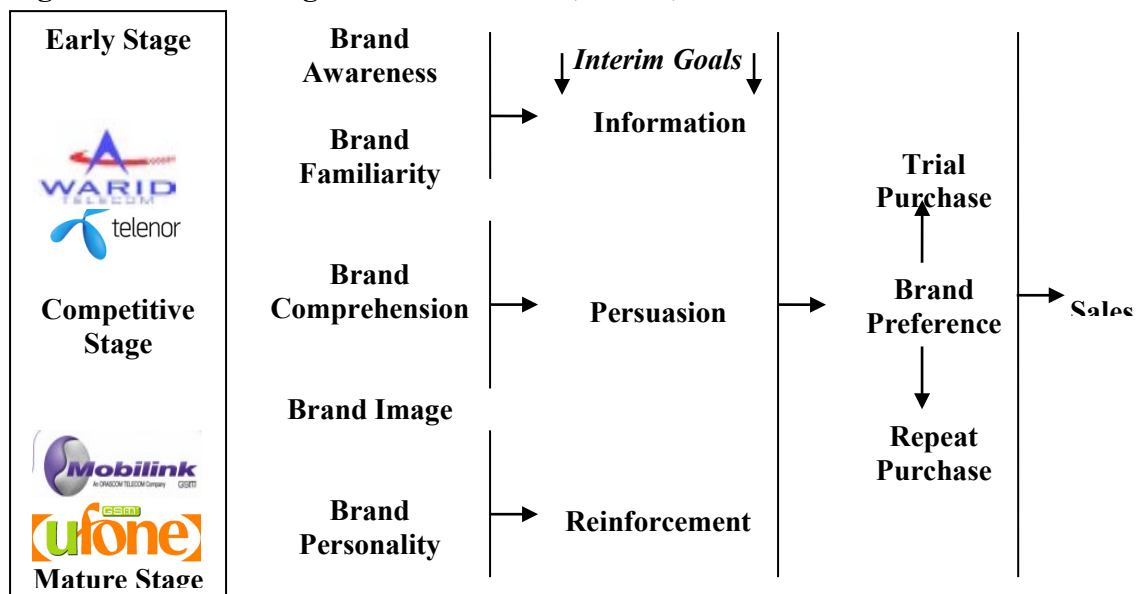
Source: Tiwari, 2003, pg 92

The interim goals exit for each advertising campaign being carried out by the four stated companies. Mobilink for Ladies First is doing brand awareness and familiarity and is also providing information about benefits so it is covering the comprehension and image goals but has not reached the personality and relationship aspect as of yet. The same goes for Warid's Zem and Telenor's Talkshawk package.

4.5.18 Outdoor Advertising; A look inside:
Outdoor advertising industry is booming in Pakistan. Although only certain formats are in use, still the industry is earning lots of revenue. Billboards are the major outdoor structure companies are advertising on, besides that there is transit advertising, where buses, taxi's and trucks are wrapped in advertisements. Advertising is also being done on bus shelters and at Airport terminals.

In Rawalpindi and Islamabad, mostly billboards are visible. When Varan Buses were operating in Rawalpindi, their bus advertising was fairly common. A new service which one can see on the roads these days is 'Radio Cab,' these taxi's are the only one's wrapped in advertisements. No advertising is allowed in the airport lounges but billboards are displayed in the parking area and on the main road adjacent to the airport. There are some bus shelters that have advertisement panels posted on the front of the shelter but the most prominent outdoor advertising are: (See exhibit # 9 in appendix for pictures of banners, street light poles and overhead railway bridges as well as shop boards)

1. Billboards of various sizes
2. Neon signs of different sizes that are displayed on:
   a. Street light poles
   b. The sides of overhead railway bridges. There are only two bridges in Rawalpindi, placed near:
      i. Marrir chowk
      ii. Airport road
   c. The sides of overhead pedestrian bridges
3. Banners
4. Shop boards-these are on-premise signs that identify the place of business, although they are not major mediums for advertising but cellular companies are sponsoring boards of certain retail outlets.

Outdoor advertising has not advanced to immense proportions like in the foreign countries. Also there have not been much technological advancements in the industry except for vinyl and computerized painting and movable message technology which is not very common. Bulletins are the most common billboard used by companies. They come in many sizes by the most common ones are 10x20 feet, 60x20 feet and 30x90 feet. Companies can choose any size, it depends on their budget, location and the message they want to convey. Billboard advertisements can be displayed in many different locations, following are some of them:

1. At major traffic signals or major Squares/Chowks
2. On the sides of major highways/roads
3. In front of a park/historical building-public places
4. On the roof tops of commercial plazas
5. On the grounds of a private building/house

Ufone prepay billboard as shown in Figure 36 is displayed at TM chowk that is a major intersection but it is erected on the grounds of a private hotel, Flashmans Hotel. The second picture is of Ladies First billboard positioned on the right side of Airport Road which is a major highway since it is the only road alongside Islamabad Airport. The Rawal Ad billboard as shown in Figure 37 is displayed in front of Roomi Park, facing the commercial plaza, PSO petrol pump and even two main traffic signals from where drivers and passengers can easily read the message, since the billboard is 30x90 feet in size. The other picture in Figure 37 is the Lux billboard, which is located on the roof top of a commercial plaza that houses medical stores as well as a bank and a dry cleaning service.

Figure 36: Two Prime Locations of Billboards

The regulatory authority responsible for the approval of billboards in Rawalpindi is the Rawalpindi Cantonment Board. The board has set up a system for the approval and charges the companies for the installations of hoardings in various localities of Rawalpindi. The procedure starts when the company submits an application along with the sketch of the billboard. The board does a site check and writes a feasibility report. The board has to look at aspects like whether the location is private or public and if the billboard is to be displayed on top of a house; if that is the case than the company should

get an NOC from the owner, the strength of the house is also checked to see whether it can hold such a huge steel structure. Finally the tax documents of the house are also reviewed to make sure that the owner is not a defaulter. Once these aspects are cleared, the board makes recommendation if the feasibility report is not positive otherwise the board approves the application.

The Cantonment board has developed a rate sheet for each type of advertisement and also it has categorized locations into A-1, A and B classes. Besides this the Board has declared certain sites as 'Prime sites.' Factors that determine a prime site are:

1. The number of cars that drive by
2. Whether it is near any plazas, hotels or stores
3. It is at a major intersection that connects two or three roads

Prime site billboards are auctioned off instead of being rented on normal rates. According to an official at Cantonment Board, Roomi Park billboard, which is 30x90 feet in size, was auctioned off for Rs. 47 lakhs per annum and Lux billboard, which is 60x20 feet in size, was auctioned at Rs. 27 lakhs per annum. Following are the pictures of both these billboards.

Figure 37: Roomi Park and Lux Billboards

The Cantonment Board has declared the following as prime sites and they shall be auctioned:

1. Roomi Park on Mall Road
2. TM Chowk
3. Marrir Chowk
4. Pir Wadahai Chowk

The Board has also revised rates for each type of hoarding plus has categorized areas. The areas falling in various categories are:

- ✓ **A-1:** Murree Road, The Mall Road up to Roomi Park.
- ✓ **A:** Peshawar Road (after Roomi Park up to Golra Morr, Bank Road, Haider Road, Adamjee Road, Shabbir Sharif Road, Kashmir Road, OP No:22, Police Station Road, Hospital Road, Qasim Market and Nauguza Road
- ✓ **B:** All other areas not included in A-1 and A.

The existing rates are lower compared to the proposed rates; Cantonment Board has changed the rates due to rise in the demand of billboards. The Board has specified the type of advertisement, the category and the rate for each one of them. Following table shows all of them.

Table 16: Rates of Billboards Charged by Cantonment Board

S. No	Type of Advertisement	Category	Existing Rates per sft per month (Rs.)	Proposed Rates (Rs.)
1	Panaflex trivision & Neon sign	A-1	55	80
2	Panaflex trivision & Neon sign	A	45	70
3	Panaflex trivision & Neon sign	B	25	25
Sky Fee/Charges				
4	Panaflex/ Trivision & Neon signs	A-1	40	40
5	Panaflex /Trivision & Neon signs	A	35	35
6	Panaflex/ Trivision & Neon signs	B	15	25
7	Cloth Banners	A-1, A	100 per banner per week	200 per banner per week
		B	100 per banner per week	200 per banner per week

Source: Cantonment Board Resolution, 2005

4.5.19 Hypothesis Testing:

The focus of this research was to look at outdoor advertising in Pakistan telecom industry. A survey was carried out to ask consumers about the outdoor formats cellular companies use and whether they are effective in attracting attention. Respondents hailing from the Rawalpindi and Islamabad region were surveyed in particular about the various cellular billboards they see displayed on major highways and traffic signals. Interviews were also conducted of the concerned individuals working in the Rawalpindi Cantonment Board, the regulatory authority responsible for the approval of outdoor advertising in Rawalpindi.

The purpose behind this research was to test certain hypotheses that were stated in chapter three. The hypotheses were formulated, to provide a clear framework and a guide when collecting, analyzing and interpreting data from surveys.

The hypotheses were:

➢ **H1: Outdoor advertising is an effective compliment to other advertising mediums**

<div align="center">H1: Accepted</div>

This hypothesis has been *fully accepted*. The advertising analysis as well as the survey results revealed that companies do not use outdoor advertising as the only medium of advertising; they always use the electronic and print media as it helps spread the message more clearly and to a lot of people.

Advertising Analysis-Support:
Billboards are a mass medium but they are targeting the local audience, companies want to spread the message all over Pakistan, they need to advertise in newspapers and television as well. For example in the case of Talkshawk, the billboard only carries some text and images whereas the selling point of the campaign was the jingle playing in the commercial. Similarly, the print advertisements displayed in exhibit six and seven support the hypothesis for example the Ladies First print advertisement and billboard share the same tagline: *"...aisay karti hoon,"* visual: "picture of Sunita Marshall holding the Ladies First Package and color: 'red and yellow.' Even though the print ad has a lot of information, the overall concept and theme is the same for all three mediums. Cellular companies, national and multinational companies have to advertise in other mediums because billboards only help bring the message to the streets and instill the brand or product/service in the mind of consumers.

Survey Analysis- Support:
The questionnaire asked respondents, about the medium that first informs them about advertisements and most of the respondents said television and newspapers. Another question asked them whether billboard advertising is better than TV or newspaper advertising and majority of the respondents disagreed with this statement that billboard is not better than the two but is the complement of the two.

> **H2: Outdoor advertising is not a structured medium in Pakistan, yet**

<div align="center">

H2: Accepted

</div>

Hypothesis number two has also been *accepted*, since the industry has been continually criticized for its varies practices

Public Opinion-Support:
The outdoor industry is earning lots of revenue as each company is going with the trend and advertising on billboards. But many people are not happy especially the public that has to see them on a daily basis. According to Mamun M. Adil, in his article in Aurora, he said that 'while this growth has been good news for outdoor companies and billboard site owners, the sector remains a highly unregulated one."

There are many articles in newspapers and magazines that state the reason why people do not like billboards. There have been many casualties and deaths due to billboards. According to billboard site owners, putting the up the steel structures is a risky business especially after the introduction of huge structures that are more than 20 feet high. Laborers usually work at a minimum height of 50 ft from the ground when erecting a board of 30x90 ft. Height and electric shock were the main reasons of worker-casualties. Some innocent civilians have also been the victim of falling billboards.

A rickshaw driver was killed a few days ago when a billboard, unable to sustain a mild dust storm, landed on the rickshaw in the Civil Lines area. Two years ago, another billboard accident killed four people in Samanabad. A few accidents were reported last year, and in one case, a powerful storm ripped down a billboard, injuring a motorcyclist and a few pedestrians on the DHA main boulevard, which is dotted with billboards of all sizes and types. According to traffic police, there are several jumbo-sized billboards in the city that may plummet any time in case of heavy storms. (Faryal Shahzad, 2004)

Survey Analysis- Support:
Respondents were also asked to state their view, whether billboards are hazardous or not and many people agreed that they indeed are, even though people find them interesting and attractive but the huge steel structure can cause a lot of damage if they are not placed in the right location and are not strong enough to take on powerful winds.

> **H3: Outdoor advertising is playing an important role in the awareness of the product and brand**
<div align="center">

H3: Accepted

</div>

Outdoor is ideal in generating awareness for products and services. It has helped advertisers in getting their message across to the general public. Since many people are working they do not get enough time to watch television or read newspapers,

billboards can tell consumers about new products or services. The metropolitan city streets are crowded with cars and traffic jams are a regular site, this allows the audience to read and comprehend the billboard message more carefully as most chowks are considered prime sites and many billboards are erected their to attract immediate attention.

Survey Analysis- Support:
The questionnaire asked respondents to state promotional campaigns they remember displayed on billboards by various cellular companies, most of the respondents remember Talkshawk and Jazz Ladies First and they are aware that Mobilink, Telenor, Ufone and Warid advertise since their billboards are the only ones displayed in Rawalpindi and Islamabad among the rest of the cellular companies that are not advertising in the great outdoors. Instaphone and Paktel are advertising in the print media but not on a continuous basis. (See exhibit # 10a, 10b and 11 in appendix for their print adverts)

Billboards are helping consumers stay in touch about the latest offerings by cellular and other companies. Most of the respondents believe that if it were not for advertising on billboards they would have not known that the product exists. This especially true for local companies or restaurants that have opened up in Rawalpindi, for example McDonald's opened up its franchise in Jinnah Park, it put up banners and billboards to inform the people of Rawalpindi that they are in town to serve them. Billboards are a good medium to use for local stores, restaurants and hotel advertising. For national and multi-national it is even more appropriate since it helps increase demand and awareness and enhances the reputation of the brand among the masses.

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