

SUSTAINABLE OUTDOOR ADVERTISING: A PROFESSIONAL POINT OF VIEW FROM SPAIN

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ABSTRACT:

Cities are unimaginable without outdoor advertising, and outdoor advertising, sometimes known as out-of-home advertising, is unimaginable without cities. However, this relationship is evolving due to the inevitable need today to take sustainability into account. As is becoming clearer every day, our planet is finite and it is up to us to bring hope to our present and our future. Sustainability consists of three aspects: social, economic and environmental. In this article, we take as its starting point the meaning of sustainability in relation to the city and outdoor advertising. The studies consulted confirm that outdoor advertising companies must work towards this sustainability to improve their relations with citizens, through an effort that also involves generating initiatives that come from all the actors involved in the outdoor activities at cities. In this research, we have collected the state of art about this question, and we also have analysed the opinion of one of the agents involved in integrating sustainability into the outdoor advertising activity, the exclusive outdoor advertising firms. We have investigated what they understand by sustainability and analysed whether their strategies are evolving in the same way as the meaning and significance of this term for the city and its citizens.

KEY WORDS:

city, environment, exclusive outdoor advertising firms, inclusion, management, outdoor advertising, sustainability

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1 Introduction (State of Art)

Although its origins go back a long way, out-of-home advertising is very much alive and well.¹ Advertisers certainly perceive campaigns that use it as effective.² The outdoor environment includes various media which are either in the street or in private spaces (for public use or in the public domain), and these may either be open or closed. Outdoor advertising has evolved in parallel with the development of our cities. In this evolution it

1 ROUX, T., VAN DER WALDT, D. L. R.: Out-of-Home Advertising Media: Theoretical and Industry Perspectives. In *Communitas*, 2014, Vol. 19, No. 1, p. 96.

2 TAYLOR, R. C., FRANKE, R. G., BANK, H. K.: Use and Effectiveness of Billboards. In *Journal of Advertising*, 2006, Vol. 35, No. 4, p. 21-34.



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has found its value and meaning as, in many cases, it has ceased to be the only 100% advertising medium to begin to perform a social task. However, some authors emphasise the fact that, like all advertising, outdoor advertising has a sales objective that must not be forgotten.³

The urban space is made up of public spaces. Their vision, function and use has gone through different stages. These spaces have brought people together, giving meaning to cities and providing them with a familiar, recognisable physiognomy for citizens.⁴ With the evolution of urban space, out-of-home advertising is being shaped and adapted to the tension between the principal agents that use it: pedestrians and vehicles. Today, more than ever, the balance and harmony that mean cities can be enjoyed sustainably are at stake.

Outdoor advertising has always been aware of this philosophy, conscious that its sustainability depends on respecting the balance of the city. Its primary social function is to respect the balance between the agents in the city. Today, this social function also incorporates the prism of sustainability and its positive impact on health and the environment. For this reason, we need to delve deeper into the concept of sustainability and the sustainable city. We need to analyse outdoor advertising in this light and move towards sustainable outdoor advertising and its implications. This research analyses the view of firms involved exclusively in outdoor advertising, given their importance and prominence. This study has the following aims:

- To specify and define the meaning of sustainability in relation to outdoor advertising and the city.
- To find out what media professionals, specifically exclusive outdoor advertising firms, understand by sustainable outdoor advertising.
- To determine whether these agents, as the main stakeholders, are working on sustainability within their firms, and to review the specific actions they are carrying out, taking into account possible differences in the size and scope (Spanish or international) of the companies.

This study begins with a review of the existing literature focused on the sustainability of cities and out-of-home advertising. Secondly, in the methodology section, a field study will be carried out based on primary sources, using a semi-structured questionnaire to the most important exclusive outdoor advertising firms⁵ in Spain. The members of Fede-AEPE (the Spanish Federation of Advertising and Communication Companies, Outdoor Advertising section) were consulted. An appropriate sample was selected from all the members of the federation, based on the proposed objectives described above, taking into account control aspects such as company size, scope and turnover.

2 Methodology

Sustainability and the Sustainable City

Before proceeding to investigate what sustainability means for cities and how it translates into outdoor advertising activity, it is essential to define the term “sustainability”. In 1987, the World Commission on Environment and Development mentioned the concept of “sustainability” in the Brundtland Report, when it stated that “*sustainable development is development that meets the needs of the present generation without compromising the ability of future generations to meet their own needs*”.⁶ According to Maccedo, this definition underpins the idea that resources are not unlimited. Growth, therefore, has a limit, which implies taking care of the planet in the present⁷ with a sufficiently broad and at the same time limited perspective so that this makes

sense, allowing progress and the continuation of development with the changes necessary so that resources do not run out. The economy and the environment must therefore be handled together, as “*we are considering the sustainability of development without growth, adjusting the economy to the demands of ecology and global social welfare*”.⁸

This definition of “sustainable development” is based on the theory of the three dimensions, which includes the need to work on three aspects: ecology, through respect for the environment; economics, by including economically viable measures; and the social area, in the sense that such measures should be socially equitable.⁹ This theory stresses the need to move from growth to development by analysing the current economic structure and the institutional system linked to it, and the need to find a circular economy that allows cycles to be closed and highlights the importance of using renewable resources and energies, avoiding waste generation. This would involve inviting those who pollute to contribute economically. Fairness and the ecological debt, both between generations and between the different groups living in the same society and between countries, should also not be forgotten.¹⁰

The World Conservation Union (United Nations Environment Program and World Wildlife Fund), in 1991, indicated that sustainable development has to involve an improvement in quality of life, always within the limits of ecosystems. Once again, economics and ecology are interrelated if we want to understand of what sustainable development is. The conclusion is that sustainability must be linked to ecological viability and that it is necessary to understand how nature works to adapt society to the same principles, based on the cyclical model mentioned above. This implies that sustainable development must be renewable, self-producing, without waste, and with solar energy as the main power source. Some authors stress the need to understand the idea of sustainability considering that growth and sustainability are part of different thought systems: while growth would be based on production, sustainability would concentrate on physical processes.¹¹

The concept of “sustainability” and its implications lead us also to approach the issue from the point of view of cities in order to continue moving forward towards our main objective. That is to detect and propose criteria for developing a sustainable outdoor advertising model exportable to any company and applicable in any urban area. First of all, it should be pointed out that the goals for achieving all aspects of sustainability must be precise and explicit, as this is the only way to achieve the objectives sought. To talk about sustainability and the city, we need to review the types of sustainability defined by Norton who differentiated between weak and strong sustainability.¹² The latter deals with the ecosystems in which human beings and their lives are immersed, making it that which concerns cities. Within this general framework, it would also be necessary to differentiate between sustainability at global level, concerning the planet; at local level, specifying a particular space and time; and partial sustainability, focusing only on a specific aspect. Cities would be at local level, although this does not mean they can develop without any relationship with the global and partial plans, because it is necessary to deal not only with the problems originating within cities, but also those leading to the existence of cities.

To this circumstance we must add that transformation processes always have an energy cost, and that cyclical processes need an external agent to act as a lever to close the different cycles. This fact cannot be ignored in the path towards transformation to more sustainable cities. According to Vazquez, this is simple on paper: we need to “*recycle cities*”.¹³ But what is a city? It is not the aim of this study to look in depth at the

3 ROSSITER, J. R., PERCY, L.: How the Roles of Advertising Merely Appear to Have Changed. In *International Journal of Advertising*, 2013, Vol. 32, No. 3, p. 391-398.

4 GAMBOA, P.: El sentido urbano del espacio público. In *Bitácora*, 2003, Vol. 7, No. 1, p. 13.

5 Remark by authors: Exclusive outdoor advertising firms are the companies that own the different outdoor advertising media and which must be contacted to book and implement advertising campaigns in this medium.

6 UNITED NATIONS: *Report of the World Commission on Environment and Development*. Released on 18th December 1979. [online]. [2022-02-05]. Available at: <<https://digitallibrary.un.org/record/139811>>.

7 MACEDO, B.: El concepto de sostenibilidad. In *Oficina Regional de Educación para América Latina y el Caribe*.

8 OREALC/2005/PI/H/12. Santiago : UNESCO, 2005, p. 1-4. [online]. [2021-09-05]. Available at: <<https://unesdoc.unesco.org/ark:/48223/pf0000162177>>.

9 MACEDO, B.: El concepto de sostenibilidad. In *Oficina Regional de Educación para América Latina y el Caribe*.

10 OREALC/2005/PI/H/12. Santiago : UNESCO, 2005, p. 1-4. [online]. [2021-09-05]. Available at: <<https://unesdoc.unesco.org/ark:/48223/pf0000162177>>.

11 ARTARAZ, M.: Teoría de las tres dimensiones de desarrollo sostenible. In *Ecosistemas, Revista de Ecología y Medioambiente*, 2002, Vol. 11, No. 2, p. 1-6.

12 ARTARAZ, M.: Teoría de las tres dimensiones de desarrollo sostenible. In *Ecosistemas, Revista de Ecología y Medioambiente*, 2002, Vol. 11, No. 2, p. 1-6.

13 NAREDO, J. M.: Sobre el origen, el uso y el contenido del término sostenible. In *Cuadernos de Investigación Urbanística*, 1996, Vol. 41, No. 1, p. 12.

14 NAREDO, J. M.: Sobre el origen, el uso y el contenido del término sostenible. In *Cuadernos de Investigación Urbanística*, 1996, Vol. 41, No. 1, p. 14.

15 VÁZQUEZ, M.: Ciudades sostenibles. In *Cuadernos de Investigación Urbanística*, 1998, Vol. 41, No. 1, p. 64.

definition of a “city”, or to make an extensive review of everything the word implies. However, it is a good idea to have in mind a definition that can be related to the meaning of the term “sustainability”. Sáenz de Oizadefines a “city” as “*the geographical space a human being can travel through between sunrise and sunset*”.¹⁴ This definition reveals some of the strengths and weaknesses of cities in terms of sustainability, as the city is established as an essential element of development.

The move of much of the world’s population to cities is unstoppable, and, as noted by the United Nations Department of Economic and Social Affairs (May 2018), “*by 2050, two out of every three people are likely to be living in cities or other urban centres*”.¹⁵ The evidence of this concentration of population in cities is clear in the proposed *Sustainable Development Goals*. Goal 11, specifically concerning action in cities, states that some of the sustainability implications are also growing, as the report itself points out: “*[cities] also account for about 70 per cent of global carbon emissions and over 60 per cent of resource use. Rapid urbanisation is resulting in a growing number of slum dwellers, inadequate and overburdened infrastructure and services (such as waste collection and water and sanitation systems, roads and transport), worsening air pollution and unplanned urban sprawl.*” Delving a little deeper, some data offered by the proposed Horizon 2030 SDGs: “*Half of humanity – 3.5 billion people – lives in cities today and 5 billion people are projected to live in cities by 2030. 95 per cent of urban expansion in the next decades will take place in the developing world (...)*”. Since 2016, 90% of city dwellers have been breathing air that does not meet safety standards set by the World Health Organisation, resulting in a total of 4.2 million deaths due to air pollution. More than half of the world’s urban population has been exposed to air pollution levels at least 2.5 times the safety standard.¹⁶

It is therefore necessary to improve capacity to use and optimise resources to improve urban spaces, as called for in Sustainable Development Goal (SDG) Number 11, which aims to make cities more inclusive, resilient and sustainable. This is where the advertising as a business activity focused on the city and its contribution to the sustainable development of cities begins to come in. The need to improve the aspects already discussed focuses on three complementary key points: the social, and environmental and economic areas, or, in other words, people, planet and profit. The Annual Report on Sustainable Cities, drawn up by ARCADIS as part of the United Nations Human Settlement Programme (UN-HABITAT), describes them as follows:

- The social component: factors related to the quality of life of a city’s inhabitants: health, work and education.
- The environmental factor: the factors determining a city’s green label, such as its level of pollution, its initiatives to promote recycling, the extent of its green areas, and so on.
- The economic conditioning factor: the economic health enjoyed by the inhabitants of a city.¹⁷

Also from the city’s viewpoint, sustainability therefore implies acting from these three perspectives.

Sustainable Outdoor Advertising

But how can all this be applied to such a specific aspect as outdoor advertising? This is where consideration of the role of outdoor advertising in the context of complying with these sustainability indicators in the city should begin. González, alluding to the ecosystem theory, suggested the need to integrate various components of the city (understood for this research as the agents involved). For the author, “*the city constitutes a complex system characterised by continuous processes of change and development (...)*”. Along these lines, the author

indicates that the sustainable city project proposes to achieve vertical and horizontal integration (which describes the relationships between the components of the different agents of these places), stressing that the latter is necessary to “*achieve the synergies of greater integration of the social, environmental and economic dimensions to give a strong impetus to the process leading to sustainability*”.¹⁸

In this sense, advertising activity and the agents involved in it are an integral part of this ecosystem. It should be emphasised that cities and outdoor advertising have developed in parallel throughout the history. It could even be said that they have been mutually feeding off one other and that neither can be understood without the other. This is where sustainability comes into play, at a time when there is increasing discussion about sustainable cities in which out-of-home advertising that is also sustainable is decisive. Its advocates associate it with a city’s search for identity through its outdoor advertising elements, and with innovation and modernity, while its critics place it at the level of the occupation of the public space, claiming that there are things the public cannot see because of the existence of outdoor advertising media. Understanding these movements and initiatives allows us to question what sustainable out-of-home advertising should be like and what aspects should be considered so that cities can be in line with what society is currently demanding.

In his book *Comunicación, clave del bienestar social*, López described some of the functions of advertising, which in this context are made even more visible. Among other things, advertising communication has a multiplier effect on the economy, creating demand and preventing resources lying idle. It also promotes a better allocation of these resources and their optimisation – an aspect which is central to the sustainable development of cities.¹⁹ In 2020, FEDE also published a report on the contribution of outdoor advertising to the development of cities. It found that, including fees and other services related to tenders and concessions for outdoor media, the average annual contribution exceeds 20 million euros. This amount is only a guideline, as city councils sometimes also receive a percentage of the advertising revenue generated by the media.²⁰ This is not to mention the emotional benefits, as argued by Clear Channel’s International CEO, William Eccleshare: the feeling of pride and confidence generated by a brand when it uses outdoor communication. For Eccleshare, “*outdoor advertising operates under the concept of the power of the public promise*”,²¹ in other words, the endorsement of trust in the brand conferred by the outdoor medium, as a commitment to fulfilment.

There are many advocates of outdoor advertising, but also more than a few critics. A medium which, although it started out as 100% advertising, has evolved towards an undeniable social function, making its link to the city more evident, as it is no less true that encouraging the development of cities from the perspectives we have considered is not the only effect it has. It also produces negative consequences mentioned by some studies which should be summarised here. The need to incorporate sustainability criteria in outdoor advertising activity and to find out about its impact on cities makes more sense if we consider the consequences that the use (or abuse) of advertising communication elements can have on brands, on the urban or rural landscape, and on the public. For example, many studies hold outdoor advertising activity largely responsible for phenomena causing visual pollution, or for a negative environmental impact due to excessive electricity consumption, or the use of chemical substances, or the use of non-recyclable products and plastics, and this limits the possibility of considering the activity ‘sustainable’. In 2009, Olivares published a study presenting the very latest information on citizen movements or legislative proposals concerning “*the culture of dismantling and decompression: sustainability and the ‘slow’ vision, which, from an environmental perspective, began at the end of the first decade of our century*”.²² The misuse of urban outdoor advertising in any of its conventional or innovative formats – from billboards and bus shelters to ambient marketing or outdoor advertisements on asphalt and other architectural elements – is considered by some authors to be responsible for a decline in

14 VÁZQUEZ, M.: Ciudades sostenibles. In *Cuadernos de Investigación Urbanística*, 1998, Vol. 41, No. 1, p. 66.

15 UN: *Around 2.5 Billion More People Will Be Living in Cities by 2050, Projects New UN Report*. Released on 16th May 2018. [online]. [2021-06-07]. Available at: <<https://www.un.org/development/desa/en/news/population/2018-world-urbanization-prospects.html>>.

16 UN: *Objetivo 11: Lograr que las ciudades sean más inclusivas, seguras, resilientes y sostenibles*. [online]. [2022-01-01]. Available at: <<https://www.un.org/sustainabledevelopment/es/cities/>>.

17 ARCADIS: Índice de Ciudades Sostenibles de Arcadis 2022. [online]. [2021-06-07]. Available at: <<https://www.arcadis.com/es-es/knowledge-hub/perspectives/global/indice-de-ciudades-sostenibles>>.

18 GONZÁLEZ, M. J.: La ciudad sostenible. Planificación y teoría de sistemas. In *Boletín de la Asociación de Geógrafos Españoles*, 2002, Vol. 33, No. 1, p. 95.

19 LÓPEZ, R.: *Comunicación: La clave del bienestar social*. Madrid: El Drac, 2000, p. 100.

20 *Estudio la Fede-Aepe de la aportación de la publicidad exterior a las ciudades*. Madrid: LA FEDE, 2020. [online]. [2022-01-02]. Available at: <https://media.timtul.com/media/lafede/ESTUDIO%20LA%20FEDE%20AEPE%20APORTACION%20DE%20LA%20PUBLICIDAD%20EXTERIOR%20A%20LAS%20CIUDADES%20_20200401120038.pdf>.

21 DIRCOMFIDENCIAL: *Ranking de facturación de publicidad exterior*. Released on 12th January 2021. [online]. [2021-01-12]. Available at: <<https://dircomfidencial.com/marketing/ranking-de-facturacion-de-empresas-de-publicidad-exterior-jedcaux-aumenta-su-ventaja-sobre-clear-channel-20210112-0405/>>.

22 OLIVARES, F.: Cidade limpa y la contaminación publicitaria en la ciudad. In *Zer*, 2009, Vol. 14, No. 26, p. 255.

citizens' quality of life. Aesthetic reasons are put forward,²³ claiming that advertising damages the urban landscape with information saturation or excessive night lighting, for example.²⁴ Health reasons are even mentioned by Granda²⁵ and Olivares,²⁶ citing outdoor advertising as a possible cause of headaches and stress.

The following table put forward in their research (see Table 1) highlights the main conditions that could be caused by the abuse of outdoor advertising.

Table 1: Polluting effects of advertising in cities

Effects on people's health	It can damage the nervous system or sometimes cause stress and headaches. It can cause mental and emotional imbalance. It can cause distractions when driving and road accidents. Pressure.
Effects on the environment	It damages the natural landscape and green areas. It affects the ecosystem and animal species. Noise and light pollution.
Effects on the city's image and reputation	Perception of neglect and abandonment. Erosion of aesthetic attractiveness. Perception of a rather unsustainable city. Perception of a city that is weak in terms of leadership. Advertising pollution is a negative indicator for the image and reputation of cities. Controlling advertising pollution will be a factor in making cities look modern and a strategic value for cities in the near future.

Source: OLIVARES, F.: *Cidade limpa y la contaminación publicitaria en la ciudad*. In Zer, 2009, Vol. 14, No. 26, p. 261.

For more than a decade there have been citizen initiatives or regulatory proposals from city governments encouraging the limitation of advertising activity in the cities to reduce its negative impact. Olivares in 2009 highlighted some, such as Delettering (Austria) and Résistance à l'Agression Publicitaire (in English Resistance to Advertising Aggression or RAP, France).²⁷ Other projects such as See-Through de Urban Blooz, No logo by Tony de Marco; Floating Logos by Matt Siber; Sign Out by Josef Shulz; Delete! by Christoph Steinbrener and Rainer Dempf; 4,000 black posters by Santiago Sierra; and the "call to cover advertising spaces" by Stopub,²⁸ refer to various roles of outdoor advertising. Olivares focuses particularly on an analysis of the Ley Cidade Limpa in Sao Paolo. All these initiatives are motivated by public health, environmental, image or aesthetic concerns for the city. Others, such as Wikimap, a 'collaborative map', aim to denounce the most notorious cases of visual pollution appearing in cities. In the U.S., there are many counter-advertising movements in cities. Among other objectives, Scenic America, with its slogan "Change is inevitable", and association the Billboard Liberation Front (BLF) are seeking an advertising clean-up on the streets of American cities.

Other initiatives along these lines can be found in Canada (Black Point) and in Mexico, where municipal authorities have proposed visible actions to combat illegal outdoor advertising. In terms of its environmental impact, out-of-home advertising also has polluting effects related to electricity consumption, the use of chemicals such as toxic glues, the consumption of recycled paper and PVC vinyl – a toxic substance and that pollutes both water and solids.²⁹ In Europe, between two and eight million billboards are on display at any one time, a figure that is growing steadily. More than six million square metres of paper from billboards is thrown away every two weeks. This paper is not recycled, the ink is not environmentally friendly and the glue used is

toxic. All this implies that this form of advertising has disastrous consequences for the environment, and it is necessary to come up with a solution.³⁰

However, companies working in outdoor advertising from the new perspective of socioeconomic operators in the area are trying to integrate sustainability parameters into this type of advertising as well. Every day, advertising brands and exclusive outdoor advertising firms show us examples of efforts aimed at reducing their impact in the three sustainability key areas mentioned above: social, environmental and economic. Exclusive outdoor advertising firms have been working for many years to integrate the media into the space where it is going to be placed. This means not all cities have media with the same design. Instead, it is installed depending on the characteristics of the environment, using the recommendations of expert designers to minimise the visual impact of the installations. Materials are an issue that needs to be addressed more, although it is true that there have been initiatives, both for using less environmentally aggressive materials and for recycling, for example, canvas, through the manufacture of bags or other fashion accessories. That makes this type of medium sustainable.

We can also see cooperation between agencies/outdoor advertising and advertisers (brands) not only to reduce the impact of the activity but also to contribute to improving, for example, environmental quality in a particular area by applying solutions in the media and materials used. This was the case, for example, with Toyota in December 2020.

In conclusion, outdoor advertising and the city need to understand one another and work together, because of their relationship. And, for the reasons we have seen here, this must always be considered in terms of sustainability. Nowadays there is no room for looking at life any other way if we want spaces designed for citizens. The studies and research consulted therefore confirm that outdoor advertising companies must work towards sustainability to improve their relationship with citizens and groups of critics of the medium. This effort also involves generating initiatives from advertisers and other agents working in the outdoor environment that help improve the work done on the three components of sustainability. The research and reports mentioned show that it is possible to help achieve the sustainability objectives socioeconomically required in cities through proposals involving digitisation and location. The role of outdoor advertising in terms of sustainability and the city operates in these two main directions: digitisation for attention to diversity, promoting the inclusion of all citizens; and the use of sustainable materials to produce advertising. Meanwhile, strategic advertising is understood to be a key element of cities, making them respectful, inclusive, sustainable places for people to live together and generating well-being for citizens.

Materials, Tools and Variables

A questionnaire has been prepared with two main sections: the first has eight questions, intended to obtain the level of knowledge about sustainability issues in the sector and to find out the exclusive outdoor advertising firms' perception of the three main components of sustainability (social, economic and environmental). The second section, which includes five questions, seeks to delve deeper and spell out the strategies for sustainable outdoor advertising. Two types of questions were alternated in each block. Open-ended ones were used to obtain qualitative information on the subject, and questions that had to be answered using a Likert scale were asked in order to quantify and compare results.

As pointed out by Cañadas and Sánchez, "the category scale is one of the techniques for measuring beliefs, preferences and attitudes – the general aim of this research – most widely used by behavioural scientists, and (...) other fields, such as opinion studies and marketing", referring "to a scaling procedure in which the subject assigns stimuli to a specific set of categories or linguistic quantifiers, mostly related to frequency (always, sometimes, never, etc.) or quantity (all, some, none, etc.)".³¹ According to the mentioned authors, this technique has a series of advantages, including less ambiguous answers than those obtained with other types

23 ABAYA, J. E.: The Billboardization of Metro Manila. In *International Journal of Urban and Regional Research*, 2013, Vol. 37, No. 1, p. 186-214.

24 GARCÍA, J.: Publicidad exterior sostenible: Una propuesta de implementación en la ciudad. In *Arte y Ciudad-Revista de Investigación*, 2017, Vol. 11, No.1, p. 137-156.

25 GRANDA, M. E.: La contaminación visual producida por la publicidad exterior. In HERRERO, F., MATEO, C. (eds.): *Del verbo al bit*. La Laguna : Revista Latina CS, Universidad de la Laguna, 2017, p. 1354-1369.

26 OLIVARES, F.: Cidade limpa y la contaminación publicitaria en la ciudad. In Zer, 2009, Vol. 14, No. 26, p. 256.

27 OLIVARES, F.: Cidade limpa y la contaminación publicitaria en la ciudad. In Zer, 2009, Vol. 14, No. 26, p. 253-275.

28 ESTEVAN, M. C.: StredAd: Reflexiones artísticas sobre la publicidad exterior. In CRESPO, J. L. (ed.): *Bellas Artes y Sociedad Digital*. Tenerife : Sociedad Latina de Comunicación Social, 2012, p. 83-97.

29 GARCÍA, J.: Ciudad y Comunicación: Publicidad Exterior Sostenible y Pantallas Digitales Urbanas. In TUR, V., GARCÍA, I., HIDALGO, T. (eds.): *Creative Industries Global Conference. Libro de actas*. Alicante : Colección Mundo Digital de Revista Mediterránea de Comunicación, 2018, p. 12. [online]. [2021-07-01]. Available at: <http://www.doi.org/10.14198/MEDCOM/2017/12_cmd>.

30 GARCÍA, J.: Publicidad exterior sostenible: Una propuesta de implementación en la ciudad. In *Arte y Ciudad-Revista de Investigación*, 2017, Vol. 11, No. 1, p. 142.

31 CAÑADAS, I., SÁNCHEZ, A.: Categorías de respuesta en escalas tipo Likert. In *Psicothema*, 1998, Vol. 10, No. 3, p. 623.

of questionnaire, answers closer to the researcher's objective, allowing more information to be collected in less time, etc. It is relatively inexpensive and easy for the researcher to develop, and simple to understand and quick to answer for the subject. As González, Lameiras and Varela state, "its ability to estimate the intensity of the impression in the simplest possible way for the respondent is difficult to match".³²

The questionnaire includes control questions on the name of the company or, alternatively, the number of employees, in order to obtain information on different types of companies and the position of the person answering the questions. Four variables were considered in this study. The first block of variables refers to the sustainability of outdoor advertising, considering its triple dimension, with the following variables and values:

1. "Social Sustainability": "Public Space Lighting", "Attention to Diversity", "Improvement of Areas", "Cultural Assistance" and "Integration into the Environment".
2. "Economic Sustainability": "Attention for Impoverished Areas", "Improving Citizens' Quality of Life", "Increasing Well-Being" and "Creating Shared Value".
3. "Environmental sustainability": "Creation of Eco-Spaces", "Reducing Visual Impact" and "Reducing Carbon Footprint".
4. The fourth variable considered who is "Chiefly Responsible" for environmental matters in outdoor advertising, considering the following values: "Outdoor Advertising Firm's Responsibility", "Advertiser Brand's Responsibility", "Agency Creative Team's Responsibility", "City Council's Responsibility" and "the Responsibility of Others".

Sample

The starting point was a universe of companies from the Outdoor Advertising section of La Fede. We obtained replies from 25% of the surveyed universe which was considered sufficient representativeness in terms of the composition of the outdoor advertising business network, in accordance with the company turnover and size criteria, i.e., the sample achieves representativeness for the two largest international exclusive outdoor advertising firms in Spain, Clear Channel and JCDecaux, which represent more than 60% of the turnover in this specialist area of advertising.³³ These two multinationals are at the forefront of innovative trends. Meanwhile, the questionnaire was also answered by Spanish SMEs as Urban Exclusivas, VSA Comunicación, Grupo Promedios, Alpha Publicidad Exterior, Digital XXL, Grupo Élite Publicidad and Ginsa Electronic, SL.

Data Collection, Validity and Reliability

The questionnaire was distributed between 15th March 2021 and 15th April 2021. In terms of validity and reliability, it is important to highlight the soundness of a methodological design that covers the universe of the biggest outdoor advertising companies in Spain (based on members of La Fede). The similar distribution by company size also adds value. Finally, the quantitative analysis with frequencies brings consistency to the results analysis. This research work only accepted results showing common patterns as reliable evidence in sustainability strategies. This ensures robustness and explanatory power. On one hand, the largest firms with the highest turnover in the national and international market (representing more than 60% of global turnover) and, on the other, smaller companies (representing around 80% of the total number of companies operating in the market), gave a full picture of feelings in the industry.

32 CAÑADAS, I., SÁNCHEZ, A.: Categorías de respuesta en escalas tipo Likert. In *Psicothema*, 1998, Vol. 10, No. 3, p. 623-624.

33 Compare to: DIRCOMFIDENCIAL: *Ranking de facturación de publicidad exterior*. Released on 12th January 2021. [online]. [2021-01-12]. Available at: <<https://dircomfidencial.com/marketing/ranking-de-facturacion-de-empresas-de-publicidad-exterior-jcdcaux-aumenta-su-ventaja-sobre-clear-channel-20210112-0405/>>; INFOADEX: *Study*, 2020. [online]. [2021-12-07]. Available at: <www.infoadex.es>.

3 Results

Responses were obtained from the principal management positions at the companies where interviews took place: the marketing or sales and marketing manager. There was also participation from general management, management, legal management, and asset and institutional management, given that sustainability is a responsibility shared by these departments.

Regarding the first block of the survey, in which the aim is to have an overview of the issue of sustainability and its relationship with the outdoor environment, if we analyse what exclusive outdoor advertising firms understand by sustainability, the answers can be put into two groups. The first considers the need to work today to achieve a better future, with comments such as: "Involvement through current conscious actions bringing benefits and improvements for the future", or "So current activities occur without impacting the future, given that resources are not infinite". And the others aim to talk about their surroundings, the environment, and planet, considering: "actions compatible with respect for the environment and which are socially committed", "a balance of our resources with the environment" and "a balance between economy, environment and society". There is also a definition that encompasses both positions: "It is a set of actions and measures that we take today so as not to compromise the future of society and the planet from various points of view, but fundamentally related to the quality and evolution of the environment on the one hand, and, on the other hand, to ensuring that no one is left behind (the people who make up our society)."

However, when speaking of sustainable outdoor advertising their answers are unanimous in focusing on the environment and on reducing pollution. The definitions of sustainable outdoor advertising include: "advertising using production and management techniques to ensure that the possibility of continuing the activity in the future is not compromised"; "advertising whose practices and operations lead to a zero carbon footprint, in addition to 100% recycling and the use of environmentally friendly materials and products and responsible management in general"; "responsible advertising interested in minimising damage to its surroundings, both in terms of the environment and the audience it is aimed at"; and "outdoor advertising that is environmentally friendly, either because of its location (respecting the place) and/or by using sustainable materials (e.g., use of eco-solvent inks)".

The next three questions seek to observe how different aspects related to the three components – social, economic and environmental – mentioned in the theoretical framework that come together for sustainability are being considered. The industry considers that outdoor advertising has incorporated social aspects of sustainability, such as the improvement of areas of the city, lighting and integration and adaptation to the environment (see Figure 1).

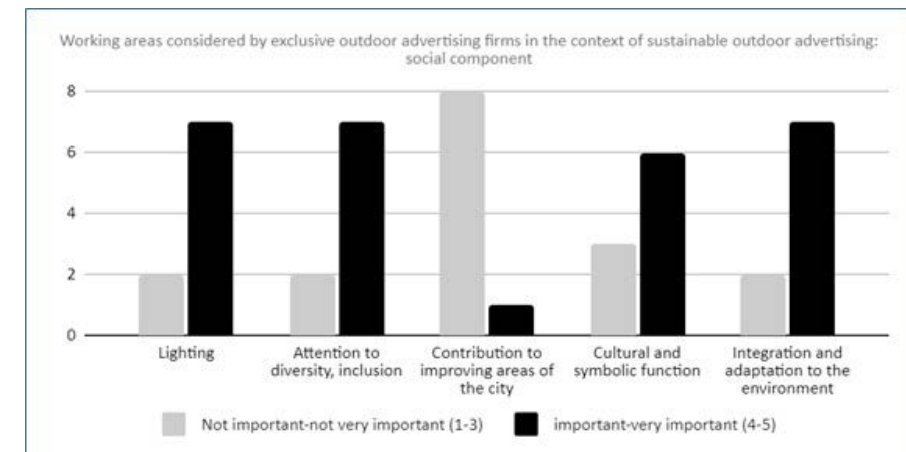


Figure 1: Working areas: Social component

Source: Own processing

Economically, the most important aspect would be that its economic contribution allows the rehabilitation of areas or buildings that improve the appearance of cities, also allowing municipalities to improve their citizens' quality of life (see Figure 2).

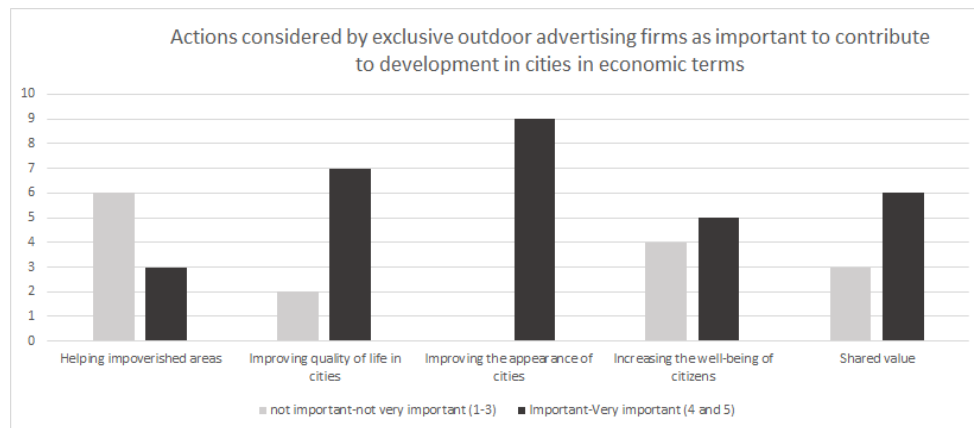


Figure 2: Working areas: Economic component

Source: Own processing

Environmentally, the main impact is the reduction of the ecological footprint by reducing the use of polluting materials (see Figure 3).

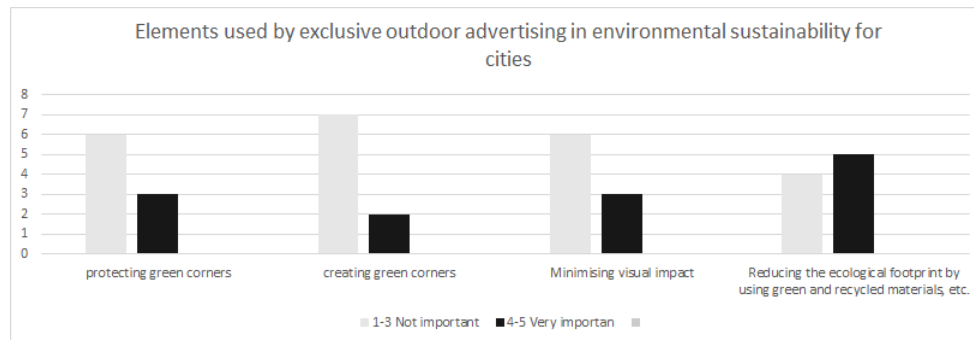


Figure 3: Working areas: Environmental component

Source: Own processing

Exclusive outdoor advertising firms consider that, based on their expertise in the outdoor environment in working towards sustainability, it is necessary to reduce obsolete structures and cut the number of illegal companies. At the same time, they believe non-polluting materials should be used, with the consequent elimination of other common ones, such as glue and paper, or those, like neon, that use gases. They also indicate that it would be very positive to minimise consumption, possibly turning off the media at 'off-peak' times. Along these lines, a report was issued on 5th May 2021 by the Ombudsman of the Valencian region, known as the *Síndic de Greuges*, requesting more control and penalties to prevent light pollution and contamination.³⁴

On the other hand, the exclusive outdoor advertising firms agree that the use of sustainable materials and new technologies that help to 'clean' the air, for example with antibacterial effects, must be strengthened. They

34 ROIG, J. B.: *El Síndic de Comptes pide más control y sanciones contra la contaminación lumínica*. Released on 5th May 2021. [online]. [2021-05-05]. Available at: <<https://www.levante-emv.com/comunitat-valenciana/2021/05/05/sindic-comptes-pide-control-sanciones-51315714.html>>.

also indicate that the digitisation of media is a way of moving towards cleaner and more sustainable cities. Two responses stand out, one of which mentions the need to introduce a green tax on the broadcasting of any kind of advertising, including outdoor advertising. The other calls for the certification of sustainable companies as an added value to highlight their quality. The fieldwork also analysed the exclusive outdoor advertising firms' perception of which agents they considered to be responsible for working to achieve sustainable outdoor advertising. We found seven responses indicating that the exclusive outdoor advertising firms themselves had a great deal of responsibility; advertisers and media agencies were apportioned a medium level of responsibility; and creative agencies a low level of responsibility. Those surveyed added associations, engineers and suppliers as also having a degree of responsibility, as they considered that all parties involved in the process had work to do in this respect. It should be noted that the spotlight is also on municipalities and their legal requirements, with the path towards sustainable outdoor advertising a decisive aspect (see Figure 4).

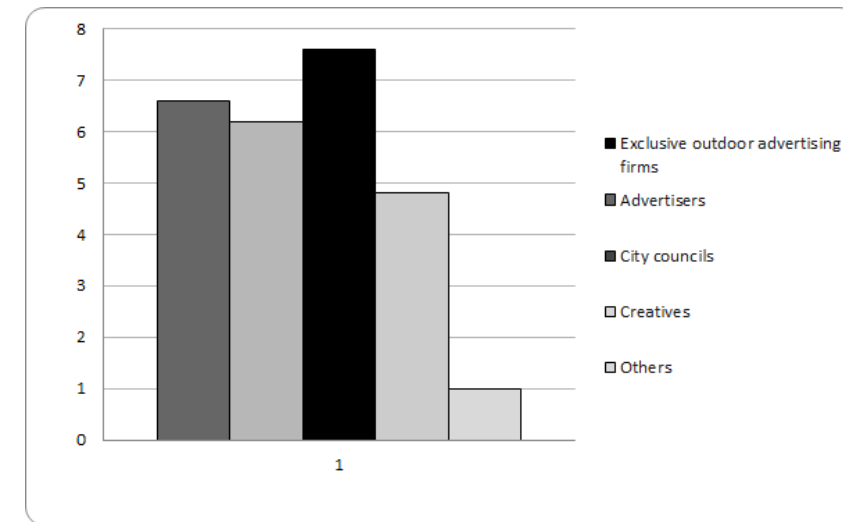


Figure 4: Those responsible for the process towards sustainable outdoor advertising

Source: Own processing

In answers to a previous question, media digitisation was raised as an aspect that can positively influence sustainable development. When directly asked about this issue, all respondents said that it was the way to go, as it reduces the use of polluting products and the fixing process for campaigns. It also allows more efficient use of media. However, respondents also pointed out that digital screens have an energy cost that must be taken into account. With respect to whether creativity can influence the sustainable development of the outdoor environment, only two answers indicated that it could not. The others pointed out two possible influences: on one hand the use of messages to promote this kind of sustainability, and, on the other, the use of sustainable media.

For the second block of questions, aimed at delving deeper into the strategies or actions already being implemented by the exclusive outdoor advertising firms in their everyday work, 100% of the companies said they were working on this issue, although some consider that countries such as the United Kingdom are ahead of Spain. If we analyse the aspects considered when making decisions on the placement of media (see Figure 5), most of the responses highlight the materials used in the campaign, followed by the environmental impact, the negative visual impact and the message and its location. The darkest colour shows the number of responses considering these aspects to be important or very important, and the lightest colour shows those considering them to be less important.

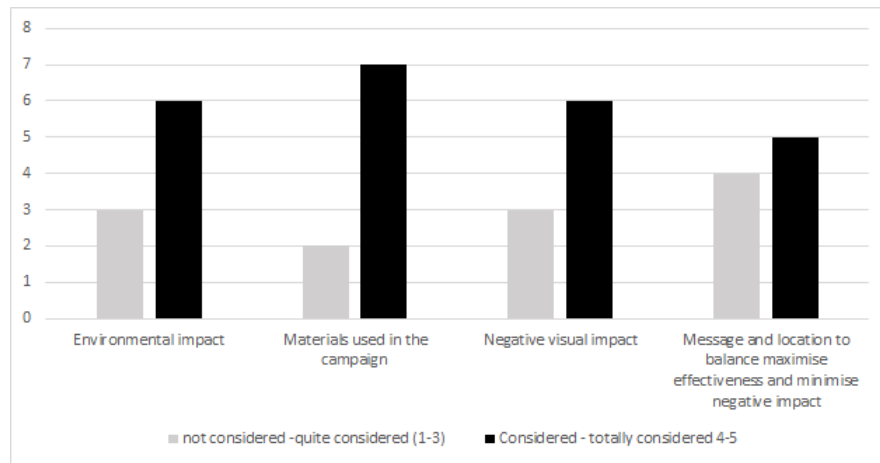


Figure 5: Siting decisions

Source: Own processing

Regarding the implementation of environmental care strategies in relation to the design of media and their location, most exclusive outdoor advertising firms consider it essential to preserve the green areas of our cities and to work together with customers to improve efficiency and reduce environmental impact. Planned strategic action is already being taken on care of the environment, however. The exclusive outdoor advertising firms, therefore, consider it very important to implement environmental care strategies through the preservation of green areas in the city, for example, or acting in those green areas or focusing on them, and, above all, working with clients to reduce environmental impact (see Figure 6).

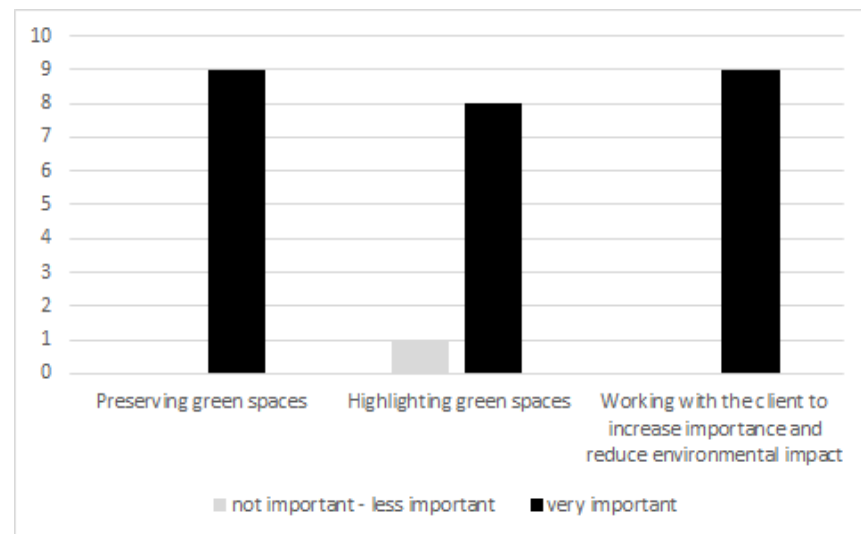


Figure 6: Environmental strategies

Source: Own processing

The majority of the sector considers it necessary to work on sustainability in outdoor advertising forms to continue raising awareness of this issue, and to have a space for sharing the initiatives that are being implemented, learning about them and being able to apply them in different cases.

4 Discussion and Conclusions

Based on the results of our analysis, there is still work to be done on sustainability in outdoor advertising, although exclusive outdoor advertising firms are beginning to take a holistic view of sustainability. As they see it, the symbiosis between the city and outdoor advertising today is oriented towards the three aspects of sustainability: economic, social and environmental. On 20th May 2021, during the Digital Enterprise Show 2021 (DES2021), Jordi Sáez, Market Leader Southern Europe and CEO of Clear Channel Spain,³⁵ presented “Creating the Future of Media” integrating innovation and data management, “while remaining responsible from an environmental and social point of view”.³⁶ He alluded to the commitment of external media to the city and to citizens from a social, economic and environmental point of view.

In Spain, awareness of the need to apply sustainability to the media has begun, and processes to help with this are gradually being introduced. Those surveyed indicated that their companies are working on the recycling and the approval of materials, waste management, the elimination of polluting products, the use of efficient car fleets, driving methods and carbon footprint measurements. They are also working with local councils and non-profit organisations on the social aspect of advertising. Also, based on our review of the research on sustainability, the city and outdoor advertising, the aspects that must be considered in order to have sustainable outdoor advertising, which in many cases according to the respondents comes through the digitisation of the medium, have been shown. However, until digitisation can be achieved, the increasing use of less polluting and more environmentally friendly materials that are also more respectful of society should not be forgotten. Evidence has been shown of specific tactics used by these agents to promote sustainability, fulfilling the third objective set. Digitisation, technology and renewable energy sources will be today’s great allies for sustainability. Ultimately, outdoor advertising is aware that the present and future challenges of its activity involve responding to the challenges of environmental, social and economic sustainability.

Throughout the study, we have analysed the meaning of sustainability and its relationship with both outdoor advertising and the city. The role of the three key areas has also been confirmed. In this way we have fulfilled the first and second objectives set for the research. Based on the literature review, we wanted to put on the table those aspects that we consider vital for the development of sustainable outdoor advertising. From there, we have spoken with representatives of the media to know the real situation from which it starts in relation to sustainability. From the fieldwork carried out we can see that, although work is being done on the path of sustainability, there is still much to be done. Larger companies have more resources and are beginning to implement actions, but smaller companies still find it difficult, although that does not mean that they are not aware, but that they must see how to enter this new reality.

We think that sustainability is not a matter of the future but of the present, and that outdoor advertising must be able to adapt to this new reality if it wants to continue living with citizens in a healthy and cordial way. From our point of view, the sector is acting correctly, but still at a slow speed, in fact, there are still few exclusivists who are really working on the path of sustainability.

Outdoor advertising must coexist with citizens and find a balance which will reduce the number of critics. Innovation has been a constant feature of the sector, which has allowed it to evolve and adapt to the permanent demands of cities. We can find many examples of sustainable work that is being carried done in the sector, with initiatives in both the messages and in the materials used, together with the bolder, more innovative ideas that are increasingly invading our streets. These would form a subject for future research that would analyse the specific cases and their involvement with cities and citizens based on the concept of sustainable outdoor advertising. At the same time the benefits for the brands launching these campaigns could also be measured.

35 EL PROGRAMA DE LA PUBLICIDAD: Eccleshore, Chairman Global de Clear Channel en Madrid. Exterior ya crece cree más del doble que la TV (al 5%). Released on 16th September 2016. [online]. [2021-06-07]. Available at: <<https://www.programapublicidad.com/william-eccleshore-chairman-global-de-clear-channel-presenta-la-nueva-oferta-digital-para-espana/>>.

36 CTRL CONTROL PUBLICARED: Clear Channel: El medio exterior ayuda a mejorar la sociedad. Released on 19th May 2021. [online]. [2021-06-07]. Available at: <<https://controlpublicidad.com/medios-publicitarios/clear-channel-el-medio-exterior-ayuda-a-mejorar-la-sociedad/>>.

We consider that the interviews carried out are relevant because they show the reality of different types of companies, in terms of size, but it would be interesting to see if what they say corresponds to what their web pages show, for example, even analyse the behaviour of other agents related to outdoor advertising, such as advertisers or agencies regarding sustainability.

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