Arriyadh Bus Transit Design Project
Work Package 12 Marketing Concept

Arriyadh Development Authority

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1.1 Analysis of the current situation

Riyadh is the capital of the Kingdom of Saudi Arabia. With a current population of approx. 4.5 million it is the largest city in Saudi Arabia and among the Gulf states. With the suburban area the overall population is almost 6 million.

It is the capital and largest city of Saudi Arabia, in the Nejd, central Saudi Arabia. Riyadh is the seat of the government, ministries, embassies, diplomatic missions, as well as it contains educational, financial, agricultural, cultural, technical, commercial and social organizations.

The city has diverse social, economic and demographic features that contribute to its unique character.

The city experienced tremendous economic and population increase in the last years; nearly 20% of the Saudi Arabian population live in Riyadh.

With regard to growth, Riyadh city is considered one of the fastest cities in the world. During the past decade, the city has witnessed high growth estimated of 8.1% annually.

The city is experiencing rapid growth in city population and boosting urban development. To secure the sustainable growth and ensure vital economy the city plans to implement an efficient bus transit system.

Year	1960	1970	1972	1974	1988
Population	150.000	370.000	500.000	650.000	1.500,000

Year	1990	1997	2005	2007	2020 *
Population	2.000,000	2.800,000	4.200.000	5.000,000	7.500,000

* For 2020 estimated

Population development 1960 – 2007/2020
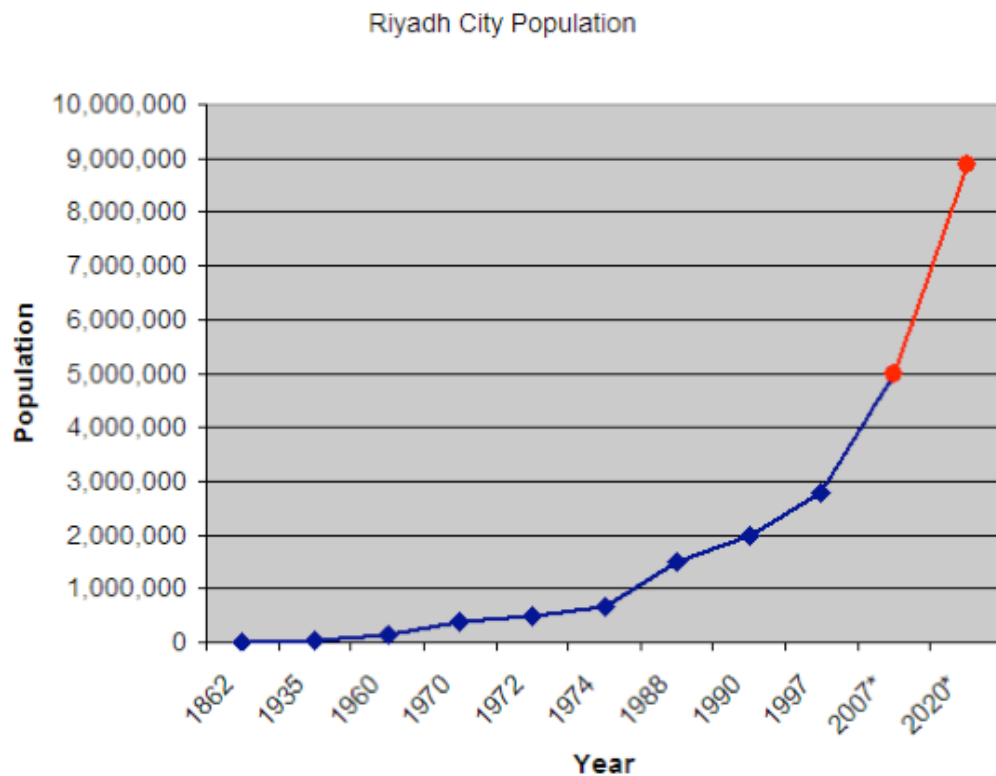
Riyadh city population development 1862 – 2007/2020

Socio-economic characteristics

Gender	Population					
	Nationality				Total	%
	Saudi	%	Non-Saudi	%		
Male	1,278,800	52%	987,100	69%	2,265,900	58%
Female	1,190,700	48%	452,700	31%	1,643,400	42%
Total	2,469,500	100%	1,439,800	100%	3,909,300	100%
%	63%		37%		100%	

Population by gender and nationality, 2004

Age	Population					
	Nationality				Total	%
	Saudi	%	Non-Saudi	%		
0-17	1,192,900	48%	388,800	27%	1,581,700	40%
18-24	382,900	16%	106,400	7%	489,300	13%
25-44	596,000	24%	766,800	53%	1,362,800	35%
45-65	252,800	10%	172,000	12%	424,700	11%
66+	44,900	2%	5,800	0%	50,700	1%
Total	2,469,500	100%	1,439,800	100%	3,909,300	100%

Population by age and nationality, 2004

Non-Saudis make up approx. 37% of the population.

The Saudi population is nearly evenly split between males and females, while the Non-Saudi population is male-dominated (69% male) because of the great number of foreign workers/labours.

There are two main structures that characterised the population of Riyadh. This structure has become evident in sharing with the Saudi society for more than thirty years when the Kingdom adopted its development programmes in different economical and social sectors with the preparation of the infrastructure thereof. The participation of this fabric has grown great particularly in Riyadh City as it is the capital and is the center and initial location of social and economical development in the Kingdom. Results of the study have revealed that the Saudi population in Riyadh City constitute 63% of the total population; whereas the Non-Saudi population constitute at approx. 37%.

By analyzing the percentages of the diversified Non-Saudi nationalities as summarized it is found that the first ten countries recorded in 2005 have formed 81% of the non Saudi population; this is the same percentage recorded in 1997 observing the slight variation in the order of these ten countries.

- The Indian nationality is number one in the list of the first ten nationalities by being 11.5% of the total non-Saudi population. The Pakistani nationality came second by being 11%, thus less that percentage recorded in 1997 which was 14%. But this does not mean

that the absolute numbers of the Pakistani population numbers have dropped.

- The Egyptian retained the third rank in 1997 and 2005, recording a percentage of 12% in 1997 and 10% in 2005

- Likewise, the Yemenis retained the fourth rank in 1997 & 2005, recording a percentage of 8% in 1997 and 9% in 2005.

- The Indonesian and Sudanese nationalities exchanged the ranking for the year 2005 where the Indonesian nationality occupied the fifth rank by being 9%, and the Sudanese nationality the sixth rank by being 8%, along with high increase of these percentages for each of them in a 2005 study.

- The Syrian nationality retained their seventh rank by being 7% in 1997 .

- The Seri Lankan nationality got out of the list of the first ten nationalities in 1997. The Jordanian nationality took a place in that list , recording 4%.

1997				2005			
Ranking	Nationality	No.	Percentage	Ranking	Nationality	No.	Percentage
1	Pakistan	137,700	14%	1	India	166,447	11.5%
2	India	119,100	12%	2	Pakistan	163,563	11%
3	Egypt	118,800	12%	3	Egypt	152,851	10%
4	Yemen	80,900	8%	4	Yemen	133,899	95
5	Sudan	73,000	85	5	Indonesia	125,247	9%
6	Indonesia	68,900	7%	6	Sudan	121,951	8%
7	Syria	54,000	6%	7	Syria	109,179	7%
8	Philippines	54,000	6%	8	Bangladesh	91,875	6%
9	Seri Lanka	39,200	4%	9	Philippines	64,684	4%
10	Bangladesh	36,600	4%	10	Jordan	56,856	4%
	TOTAL	782,200	81%		TOTAL	1,186,552	81..5%

Ranking of Non-Saudi nationalities in Riyadh City for the years 1997 & 2005

Population structure age-wise:

The population structure of Riyadh City duration-wise is featured as being "a young age-distribution" as the percentage of young ages is great as the percentage of people who are less than 15 years of age is (34%) out of the total population number. Therefore, the population hierarchy base is characterized by being wide due to the high percentage of young ages. This young age–distribution of Riyadh City will represent a huge "source" of the work-force demand in the future, requiring preparation of economic projects and programmes and increase of employment vacancies.

Population hierarchy of the non-Saudis: this is due to the fact that the recruited labourers are of ages up to the employment-age, is a middle-age population. This reflects one of the external immigration characteristics.

Average Age:
Average age of Riyadh City population is 22 years. Among the Saudi population it is 18 years; whereas for Non-Saudis it is 30 years.
The overall population of Riyadh is relatively young with 40% under the age of 18. Total structure contains 50% of the citizens fewer than 20 years and only 2% above 60.

A foresight:

These days and in the next future Riyadh will experience a continuous growing – both in economic and in the population.
The Kingdom of Saudi Arabia and especially the capital Riyadh attract migration from and within the country and abroad.
Due to the overall young population in Riyadh a great increase of new potential motorists is expected for the next years.

The analysis of the current traffic situation in Riyadh:

Travel and traffic characteristics

- Car ownership:

Overall Riyadh is a car-dominated city.

No. of cars	Saudi	Non-Saudi
Families without cars	5%	29%
1 car	48%	59%
2 cars	25%	8%
3 cars	22%	4%

Number of cars in Riyadh

In 2005 83% of the households in Riyadh own at least one vehicle and 30% of the households own two or more cars.

The average vehicle ownership for Non-Saudi households is 0,80 vehicles per household compared to 1,68 vehicles per household for Saudi households.

The low costs of car ownership and the relatively low taxation and registration charges lead to the high number of cars in Saudi Arabia/Riyadh.

Petrol costs are also very low. The costs of everyday motoring are in comparison to other metropolitan cities are marginal.

At the present Riyadh is facing a "competition" between private car usage and the (new) public transport.
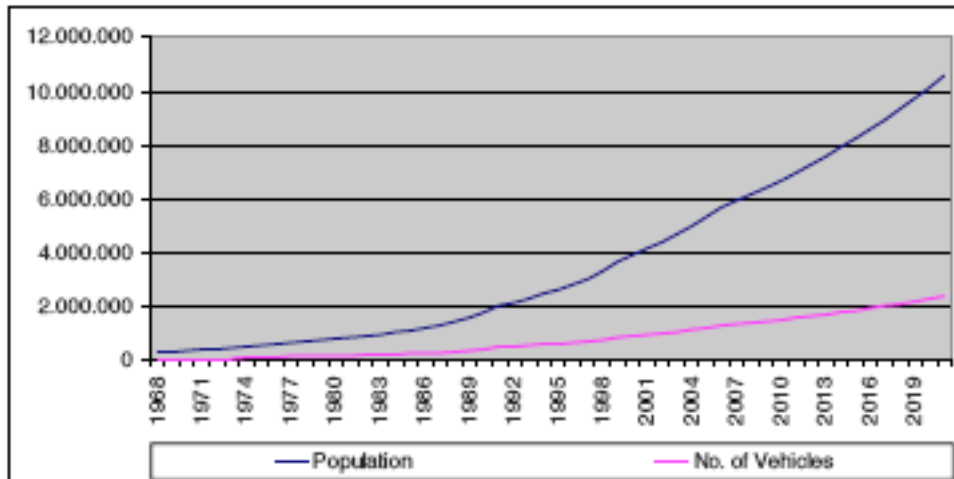
Predicted development of population and car ownership in Riyadh from 1968 – 2021

- Traffic activity

The city of Riyadh is quite similar to other (western) metropolitan cities and areas when it comes to peak time traffic activities – morning, early afternoon and early evening peak periods on working days.
Trips are relatively staple between 6.00 am and 11.00 pm.
School trips peak at approx. 6.00 am and in the early afternoon.

But we also have to consider the cultural and religious backgrounds. In Riyadh there is a significant peak period after the second evening prayers in the latter part of every evening. This creates remarkable traffic congestion around the main downtown shopping malls in the city.

- Expatriate transport needs

The majority of the expatriate workers have a low income. Most of them are transported to and from their work by dedicated or contracted transport instead of using the, limited, public transport service or own cars.
There is definitely a great need for a public transportation service for the city.
- Female transport

Females represent half of the population in Riyadh and they are nearly wholly dependant on male household drivers for their mobility, e.g. shopping trips are made by private cars because women are not allowed to drive on their own.

Mode	1989	1996	2004
Automobile	88,5%	83,8%	89%
Truck	0,9%	0,5%	-
Taxi/Limousine	0,6%	4,8%	3,2%
Private Van/Bus	8,3%	8,1%	5,7%
Public Bus/Mini Bus	1,6%	2,8%	2,2%

Metropolitan-Wide Modal split

- Present public transport service and supply in Riyadh

There is no real tradition of a public transport service or system in Riyadh.
Most of the European/Western metropolitan cities have a long history and tradition of affordable transport that is available and used by all the different social classes.
The public transport networks in those cities is characterised as comprehensive and integrated (feeder service, Park & Ride facilities, etc.).
The public transport is convenient, frequent and dependable with high order interchange between the different modes such as buses, trains, metros and light rail networks.

The current situation regarding the coverage of a public transportation system in Riyadh is completely different.

There is no public transport system that can be compared to any other metropolitan city in Europe, North America or even with cities like Shanghai, Beijing or Tokyo.

The existing public transport provider in Riyadh, **SAPTCO** (Saudi Public Transport Co.) runs a few buses and routes that almost attract low-income expatriate

commuters/labours. SAPTCO is a single public owned provider under the Ministry of Transport (MoT).

SAPTCO was established in 1979 as a public company with a government subsidy.

Characterised facts about SAPTCO:

- No complete coverage of the city
  - Only a few routes are served – irregular
- Small fleet of buses for Public Transport in the city of Riyadh
- Generally operating the Intercity-Service

Also **Coasters**, privately owned mini-buses, serve the residents of the city with a public transportation service.

The Coasters provide a competing service on 10 routes with approx.

1.200 vehicles.

The estimated number of passengers is 83.000 daily passengers.

Characterised facts about the Coaster:

- Operate fixed 9 routes
- Offer short waiting times
- Short trip times
- Flag vehicles at any street corner

Third operator is **Inter-City Public Transport**. This service runs from the new terminal south of the CBD by the Ring Road.

Facts that characterised the existing public transport system in Riyadh:

- The structure coverage of the public transport service is of low quality and do not address the demand
- The lack of governmental subsidies for the public transportation has discouraged service growth
- The competition from private operators needs to be addressed and resolved.

They operate without published schedules and their services are not integrated

- Private operators/ the coasters mark potential safety risks
- Low costs of private automobiles in the Kingdom of Saudi Arabia are not supportive for public transport services
- Many employers, major traffic generators or groups have formed their own "transportation services" in response to the poor level of public transport service in Riyadh
- Public transport in Riyadh in general is described as unsafe, inconvenient, not comfortable at all, not in time, poor network coverage
- Almost all Saudi commute by private car, car parking is for free
- There is no (school) public transport service for pupils and students (approx. over 1 Million pupils are at the age 5 -14 years)
  College students mark approx. 8% of the overall population, they form also a big number of potential bus users
- At present there are almost no waiting facilities for the rider ship that correspond to an adequate public transport system
- SAPTCO bus stops are hard to identify, actual there is no real Corporate Design, no Image

Example for the existing "transport" of workers in Riyadh:

Transport service for workers

SAPTCO is the mainly operator of public transit, which needs support by the government for infrastructure and subsidized fares for better transit.

The company purchases constantly new buses.

SAPTCO is very interested in a successful project to implement a new and adequate public transportation system for Riyadh.

SAPTCO declares its interest and willingness to closely cooperate with the Arriyadh Development Authority (ADA) and LRTC on this project.

In first meetings with the Arriyadh Development Authority and LRTC SAPTCO pointed out some important issues for a possible and upcoming cooperation regarding the implementation of the Bus Transit Design Project.

- Subsidies are absolutely necessary to provide public transport in a meaningful way
- Infrastructure needs to be provided by the municipality
- A legal framework is needed excluding other operators (including Coasters) from line awarded to an specific operator within the scope of this project
- A "transit" police is needed to enforce the legal framework, including bus priority measures
- "New" initial lines have to be attractive (travel speed, headways, reliability, comfort) to attract rider ship
- Budget is a critical point. No "high-end" solutions are recommended but reasonable ones
- Easy transfers between different modes and operators have to be ensured by applying an integrated ticket, marketing and information approach

Conclusion/results – Riyadh and the need for a public transport system:

Recapitulatory the existing conditions and the current situation in Riyadh are not demonstrating a qualified and reliable transport system for the citizens.

It is essential to improve the existing conditions and facts through a variety of actions and measures in order to achieve the goals for a new public transport

system in Riyadh that goes along with the rapidly and steady economic and population growth of the city.

A modern and metropolitan city such as the capital of the Kingdom of Saudi Arabia needs an adequate, convenient and fitting public transportation system that cares for the mobility for all the people and all social classes living in a city of approx. 4.5 Million residents.

The rapid growth of the city, demographic characteristics, and environmental and social issues are the main reasons to establish a public transport service.

Riyadh City Population
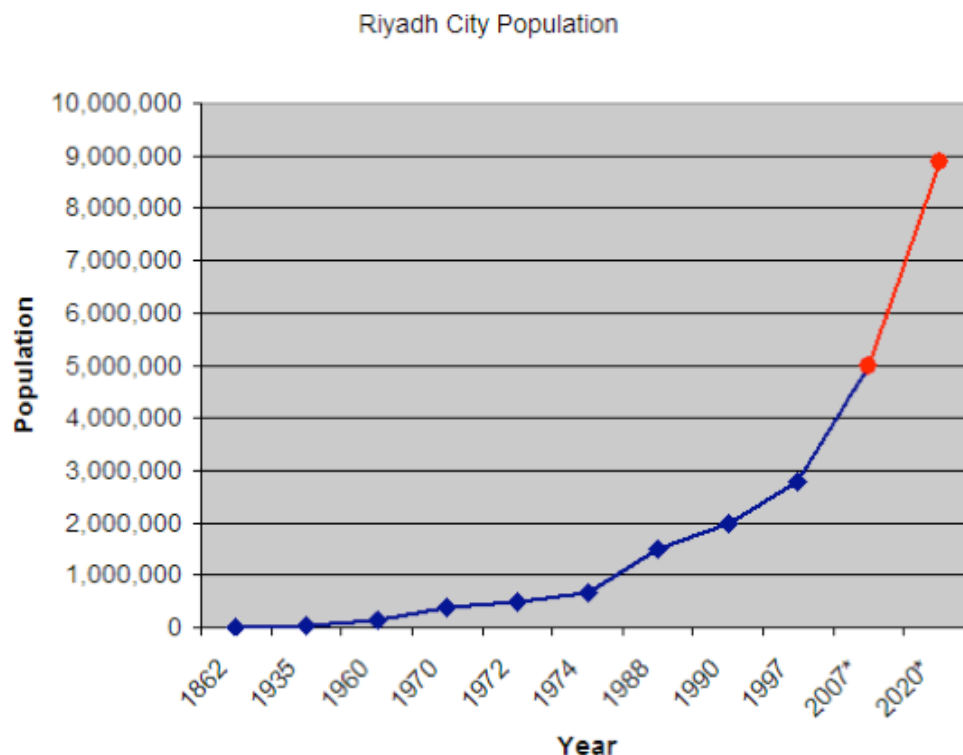
Riyadh city population development 1862 – 2007/2020

Most of the foreign workers and women are not allowed to drive.

Also the fact of the high percentage of the city's population under the age of 18 is an important reason for an adequate urban public transport system.

Overall 70% of the city's population are non-drivers due to traffic and roads regulations and religious and cultural aspects.

Also social equity in Riyadh is a very significant factor to establish the public transport.

Traffic congestion, not only in peak times, is a key problem. Due to the increase of private car ownership and the current and expected population growth and the occurring pollution and environmental problems make it necessary to install a new network and new routes for the public transport.

Riyadh is an automobile-depended city. Cars are environmentally unsustainable in terms of air and noise pollution as well as energy consumption.
Due to the demographical, environmental and economic issues that were described and defined an adequate public transportation system is required for Riyadh.

The capital of the Kingdom of Saudi Arabia is growing rapidly, both in demographic and economic terms therefore there is a great demand for an adequate public transportation system.
Public transport can be attractive and well used in Riyadh.
The new established public transport must provide an alternative to private motoring and attract car users to use the public transport.
Public transport will improve the quality of the urban life, the road safety due to the lower usage of private cars and improve the urban environment, including reduction of air and noise pollution.

There is a great chance for Riyadh to achieve a tremendous step into the future while establishing a public transport system for the city and its residents.
As the capital of the Kingdom of Saudi Arabia with approx. 4.5 Million inhabitants and the predicted development of the population and economic growth there is a great need and requirement for this metropolitan city.
Now it is up to the Arriyadh Development Authority and the Consortium to implement the Bus Transit Design Project.
We have to convince Riyadh's residents that they need an adequate public transportation system to make the next step into the future and to go along with the whole development and progressing of the city.

Some highlights that indicate the need and the essential demand for a public transportation system in Riyadh:

- Expected population growth in the city from 4 up to 7.5 Million citizens by 2020
- Public transport trips are expected to more than triple by 2020 if rapid transit is implemented
- Average trip distances are expected to grow from 11.9 km to 13.9 km (+17%) because of increased urbanization
- Expected growth of average trip times from 14 – 21 minutes (+ 52%) because of increased congestion

Public transport should make a positive contribution to overcoming the described problems and new challenges that Riyadh will face in the next years.

Following studies have been reviewed and verified for this analysis and also for the following issues:

- Metropolitan Development Strategy MEDSTAR (ADA 2001)
- Public Transport Pilot Study (Dornier 2001)
- Comprehensive Public Transport Plan (IBI 2006)
- Arriyadh LRT Preliminary Engineering Design (Semaly 2006)
- 2004 Household Survey (IBI 2005)
- Exploring the Potential for Public Transport in Riyadh by Sami Abdullah Al-Dubikhi (2007)

1.2   General marketing approach

The general marketing approach describes the aims, goals and objectives that the Riyadh Development Authority wants to achieve with the Riyadh Bus Transit Design Project.

Riyadh's growth in economic terms and population has placed enormous demand on its public transportation system and traffic system in general.

Fourteen Work Packages are established in the Riyadh Bus Transit Design Project to face these terms and conditions:

1.1   Work Package: Bus Transit Network
1.2   Work Package: Operation Concept
1.3   Work Package: Road Infrastructure
1.4   Work Package: Vehicles
1.5   Work Package: Stops and Stations
1.6   Work Package: Workshop and Depot
1.7   Work Package: Park & Ride
1.8   Work Package: IT Automatic Vehicle Monitoring
1.9   Work Package: IT Passenger Information
1.10 Work Package: IT Automatic Fare Collection
1.11 Work Package: Cost Benefit Analysis
1.12 Work Package: Marketing Concept
1.13 Work Package: Institutional Set-Up
1.14 Work Package: Third Party Operator

On the following pages the general marketing approach for Riyadh and its public transport system will be described and defined.

Various studies in the recent past recognised that the great demand for a public transportation system is justified.

The analysis of the current situation in Riyadh and further studies revealed that the city is undergoing a rapidly growth in terms of economic issues and in population.

General aims and objectives that were pursued by the Arriyadh Development Authority can be defined as:

- High-class but also affordable public transportation system for the capital of the Kingdom of Saudi Arabia
- Development of the bus system in accordance and as an integrated part of an overall public transportation plan for Riyadh – the work is based on
    ⇒ the Corporate Vision, Mission and Objectives for Riyadh's Public Transportation in general, and also on
    ⇒ the Objectives and Strategies for the development of Riyadh's Bus Transport Services in particular

- The Riyadh bus system shall become an "international landmark for modern public transport" meeting the demands of all stakeholders such as customers, employees, visitors, journalists, governments

The general marketing approach for the Riyadh Bus Transit Design Project is gradually to establish and generate and develop acceptance among the citizens for a new public transportation system.
In the first phase of this huge project the bus transit service for 3-4 lines will be implement. These lines form the backbone of an extensive public transport network.

Before reaching economical goals (profit and return on investment) it is essential for every institution and company to establish their company philosophy.

The different aims of an organisation/institution:

1. Company philosophy
2. Mission and vision
3. Business objectives
4. Marketing objectives

The mission describes the concrete objects of a company "What's our business and what should it be?"
A highly consequent consumer orientation is essential and necessary.
The mission forms a certain legal framework and also defines a determinate direction for companies/institutions.

The Riyadh Development Authority created the following mission statement for this project:

"To provide cost-effective, safe and affordable public transit services using clean and environmentally friendly equipment that enables all residents to access work, education, health care, shopping, social and recreational opportunities in Riyadh, and to connect with outside transportation systems so that regions residents can also access these opportunities."

This mission statement contains all relevant subjects but we can comprise it.

"Integrated solutions of the Riyadh traffic system that are safe, convenient and reliable and in line with Riyadh's economic and population development."

A vision describes the ambitious aspiration for further development.

The vision statement for the Public Transport in Riyadh could be:

"More than only one way"

A vision statement draws attention to the attractive opportunities available to the costumers when taking Public Transport to travel around the city (and in the future around the metropolitan region).

Description of the aims and objectives from the Arriyadh Development Authority:

All residents of Riyadh should have access to an affordable, adequate and comprehensive public transportation system that fulfils all the requirements and demands for a capital city that is growing fast, both in economic and demographic terms.
Public transport in Riyadh is for everybody, for all age groups, for all the different social and ethic groups, for all the people from the varying states and for the Saudis themselves.
All citizens of the city, whether a Saudi, a rich person or a labour worker, females, pupils or students and also visitors should use the public transport – it is there to serve everybody.

To match and to find the acceptance among the population in Riyadh it is essential to establish a public transport system and service that cares for:

- High frequency
- Shorter travel times – reliable service
- Modern and state of the art buses
- Adequate and attractive waiting facilities and bus stops
- Modern, comprehensible and understandable passenger information
- Safety and high standard in all issues

Further goals and objectives are:

- Increase the rider ship while encouraging people to leave their cars and use the buses
- Increase the overall modal split
- Service reliability and service appeal in terms of operating and maintaining the public transport system and in terms of cleanliness of the service and comprehensibility
- System accessibility – improving the transportation infrastructure

The overall consumer acceptance is one main goal and objective.

Second main objective is the discharge of the current and expected traffic situation in Riyadh.

The new public transportation system and the main goal of the Bus Transit Design Project are to serve all the residents of the city because there is huge demand for it.


The public transport system in Riyadh should develop to a comprehensive and reasonable alternative to private cars.

Little by little a goal is to change the attitude of Riyadh's residents to public transport – the citizens must be educated to use the service like it is a standard in European cities.

It is necessary to create a strong image for the new public transport in Riyadh.

A strong image must definitely go in accordance with innovations and improvements of the existing poor bus network.


The next diagrams show the results of a image-analysis of the Hamburger Verkehrsverbund GmbH/HVV (Hamburg public transport company – HVV operates underground, local trains and buses in the city of Hamburg and the surrounding area and the development of the number of passengers.
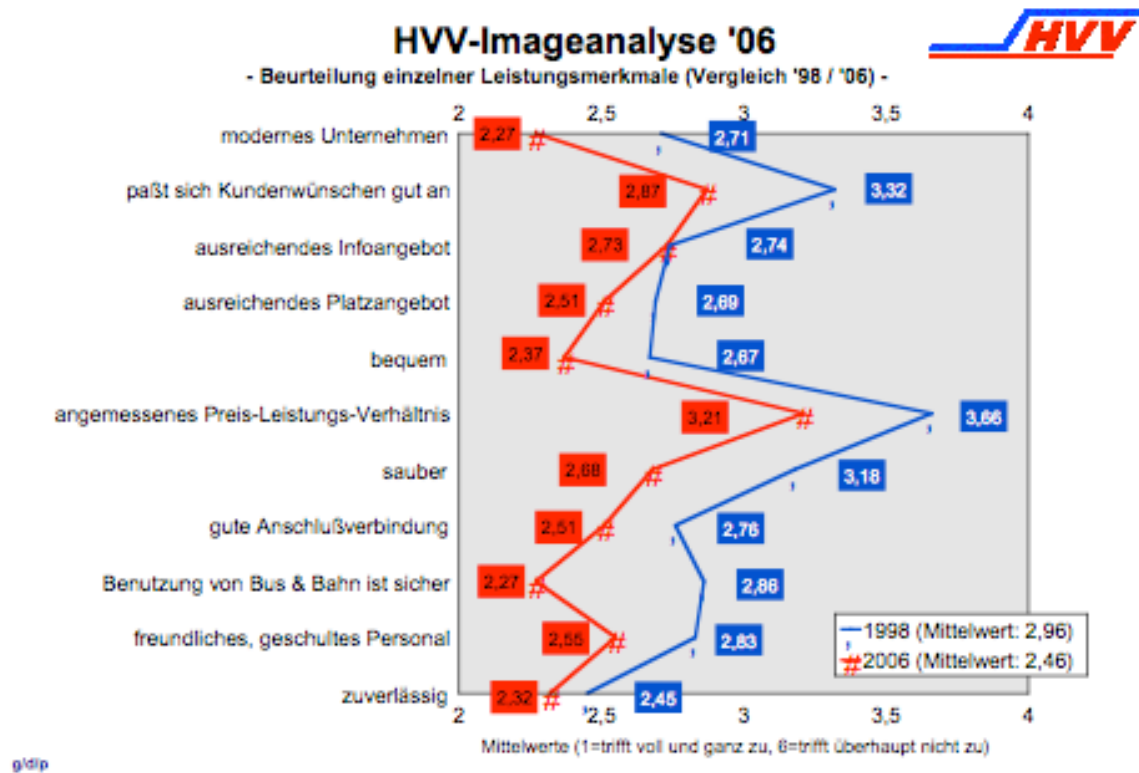
HVV image-analysis 1998 – 2006 [1] (Source: HVV Image Analysis 2006 – "Public opinion in Hamburg concerning HVV)

The most precise improvements of the HVV image in the recent years appeared in issues "safety", "cleanliness", "convenience and comfort" and "modernity".

Evaluation of the overall customer satisfaction:
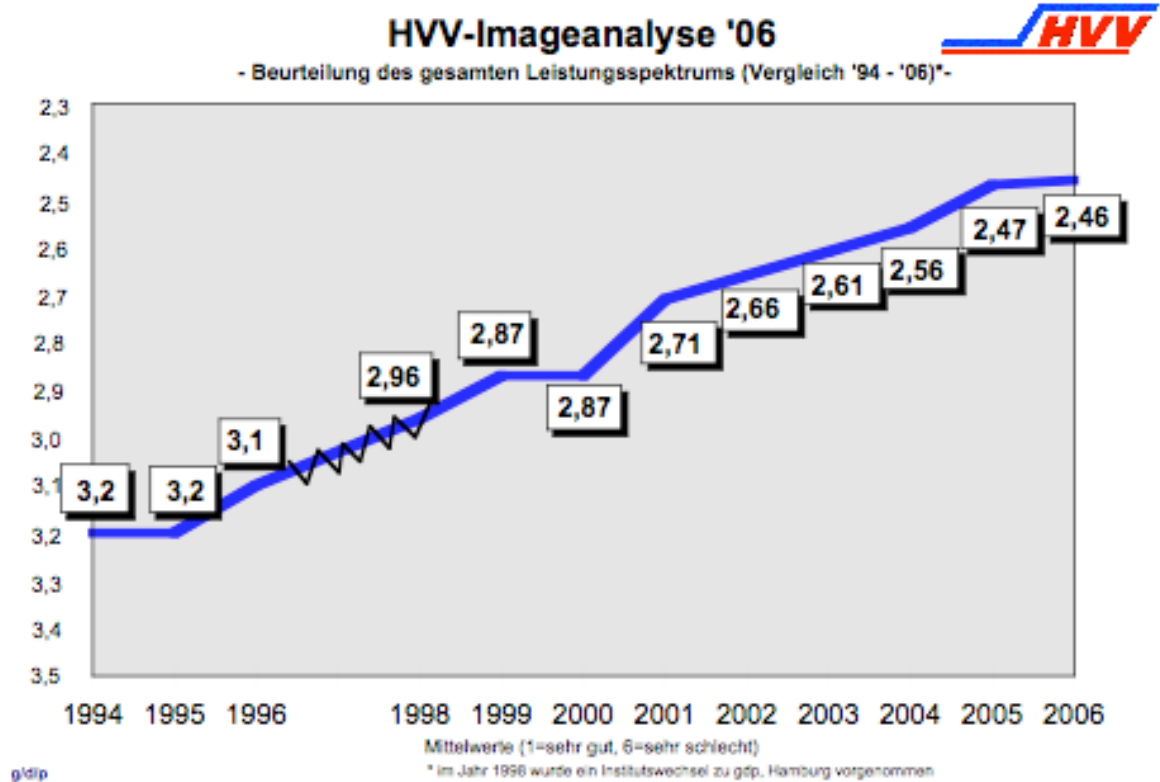
HVV image-analysis 1998 – 2006 [2] (Source: HVV Image Analysis 2006 – "Public opinion in Hamburg concerning HVV)

85 % of the interviewed people are very contented and satisfied with the service of the HVV.

The percentage of satisfied customers increased from 1994 to 2006 up to 25 %.

Entwicklung der Fahrgastzahlen 1967–2006
Development of Passenger Totals 1967 to 2006
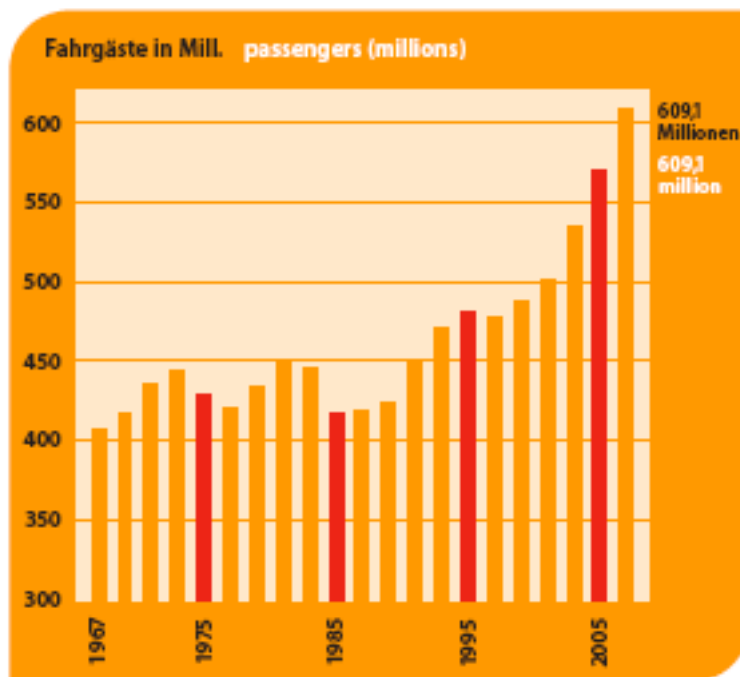
Development of passenger totals 1967 – 2006

From 1967 to 2005 the number of passengers in total continuous increased (only with some exceptions 1975/76 and 1985/86) from approx. 400 millions in 1967 up to approx. 610 million passengers in 2005.

Beurteilung des Leistungsspektrums des HVV
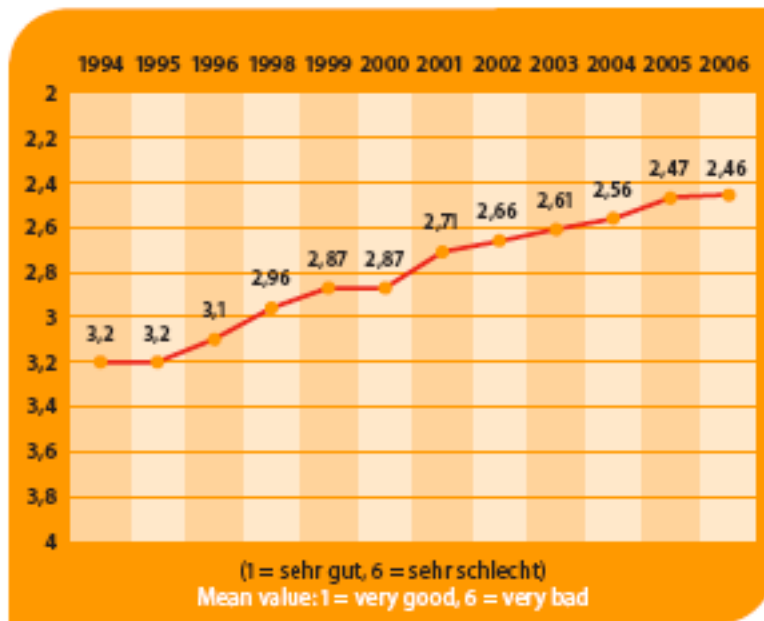**Rating of the HVV Performance Spectrum**

Quelle: HVV-Imageanalyse 2006 – „Meinung der Hamburger zum HVV"
Source: HVV Image Analysis 2006 – "Public opinion in Hamburg concerning HVV"

Rating of the HVV performance spectrum

From 1994 up to 2006 a steady improvement of the HVV performance spectrum is visible.

All the improvements and innovations must go in accordance with the cultural and religious conditions and aspects.

1.3   Target group analysis

To develop our general marketing approach and the marketing objectives we have to look at possible target groups for the communication. After we defined the positioning of the public transport service for Riyadh we have to classify the target groups we want to achieve with the marketing activities.

Relevant target groups and stakeholders are potential passengers and also the existing ones.

1. Saudi Arabian Locals
2. "Expatriates"
3. "Workers", Labour
4. Journalists
5. Temporary Visitors
6. Internal Staff
7. Local Opinion Leaders

We have analyzed the bonds and barriers they have towards the existing public transport system in the city and the private bus operators and how we should communicate with them.
For media and campaign planning these target groups should be considered.

1. Saudi Arabian Locals

Generally:
Currently, using public transport, especially the bus is nothing a Saudi Arabian local would consider because there is no real Public Transport and the existing is too uncomfortable.
Barriers to overcome:
Public Transport is something an Arabian local doesn't think about, since it didn't make the jump to the 21st century, like the rest of the city.

Possible bonds to Public Transport:

With all the improvements coming up, a new Public Transport system can become something they can be proud of.

Recommendation:

Inform and excite them about all the great upcoming achievements and the development and progress in Riyadh.

2. Expatriates

Generally:

Using the bus is - in principle - something, almost every Expatriate would find perfectly normal.

Barriers to overcome:

Using the bus currently isn't part of their relevant set for transportation in Riyadh, since it doesn't seem really comfortable and timesaving.

Possible bonds to Public Transport:

If they get the feeling that the public transportation system satisfies their transportation needs they would use it.

Recommendation:

Inform them about all the upcoming changes and modifications. Make it easy for them to use the bus.

3. Workers/Labour

Generally:

"Workers" often don't have another choice, but to use the bus, Public Transport.

Barriers to overcome:

None.

Possible bonds to the Public Transport:

Affordable and reliable transport.

Recommendation:

Constantly communicating to them, keep them informed about the achievements, the progress and news about the public transportation service in the city.

4. Journalists

Generally:

Public Transport is not something journalists are currently thinking much about.

However, they are important multipliers for our messages.

Barriers to overcome:

The currently existing isn't newsworthy.

Possible bonds to Public Transport:

If journalists get the impression the new service is something exciting to write and inform about, they will do so.

Recommendation:

Impress them. Inform them and excite them!

5. Temporary Visitors (non local business people)

Generally:

The new service is something, they might try, because they think it's exotic or they don't have a choice. They are not in the city for long but they might tell people at home about the service.

Barriers to overcome:

Currently, using the bus makes it too hard to find your way around Riyadh, Taxis are far more convenient.

Possible bonds to Public Transport:

If the new service really becomes a great experience, these people will tell people at home about the public transport in Riyadh.

Recommendation:

After our first great achievements, inform them at the airport, in travel magazines and in their hotels.

6. Internal Staff

Generally:

The (new) recruited employees should be proud of working for the Riyadh public transport system/service.

Barriers to overcome:

They don't feel that there has been put much effort in the advancement of the new service.

Possible bonds to Public Transport:

If the first achievements will be visible, the new service will become something to be proud of.

Recommendation:

It is extremely important to get internal staff excited about the Bus Transit Design Project and to get their support.

7. Local Opinion Leaders

Generally:

Local opinion leaders probably know about the importance of the Riyadh Bus Transit Design Project.

Barriers to overcome:

They don't see much progress.

Possible bonds to Public Transport:

If they see that the new service can become prestigious, we will get their support.

Recommendation:

Inform them about our plans in an early stage.

1.4   General marketing objective

Because there is no real existing Public Transport service in Riyadh the Arriyadh Development Authority has the great chance to create and build up a reliable and confidential image of a public transportation system in the city.
A strong image is the perfect and necessary foundation for a successful implementation and acceptance of the Public Transport in the city.

The most essential marketing objective for the new public transportation service in Riyadh is to create awareness for the Public Transport among the residents and all the potential customers.

A positive image is essential for succeeding in establishing a public transport system because only rational expectations do not fulfil marketing and advertising messages.
To convince the target groups it is necessary to build up and establish a positive image from the beginning.
The realisation of economical objectives is connected with the performance of the psychological aims.

By the means of communication and marketing a positive image can be created. Image is an influencing factor when it comes to buying/purchase decisions.
An image cares for the right and correct positioning of a company and its service, products.
For Riyadh does this mean that we have to develop a strong and potent image for the Public Transport in Riyadh.

Closely connected to the image is the brand awareness.
Brand awareness and the creation of an image go in accordance.

In Riyadh we must generate right from the beginning a strong awareness campaign to introduce the Public Transport in the city.
It is important to have a strong short-term impact for the awareness campaign.
The public does not know about the Arriyadh Bus Transit Design Project so we need to inform them about the intention, general information and news of this

groundbreaking and pioneering project for the capital of the Kingdom of Saudi Arabia.

It is very important to inform with a message. The residents should know from the beginning what's happening and why the Bus Transit Design Project is established.

But it is also essential to think long-term because the implementation of the Bus Rapid Transit lines only marks the start of the Arriyadh Bus Transit Design Project. After the first initial lines were established and the public transport system is integrated and accepted by the residents of Riyadh it is necessary to keep them informed for following projects and improvements.

The fact that the city of Riyadh is experiencing rapid growth in city population and boosting urban development creates a high demand for a functional and affordable public transportation service. To secure the sustainable growth and ensure vital economy the city plans to implement an efficient bus transit system.

1.5   Benchmarks

We looked worldwide at benchmark-campaigns for public transport.

We have looked at campaigns for public bus transport in terms of great ideas,

innovations we can learn from.

Paris, France - Advertisements:

Ad for Public Transport in Paris

Ad for Public Transport in Paris

Ad for Public Transport in Paris

Analysis:

Overall Impression: Clear campaign, each motif focuses on one single achievement
                                       of RATP

Message: We're advancing…

Type of Advertising: Advertising the company

Branding: Clear sender, clear messages, and clear imagery

Perception of the brand: Pro-active, responsible, caring, modern company

London, England - Advertisements:

Ad for Public Transport in London

Ad for Public Transport in London

Ad for Public Transport in London

Analysis:

Overall Impression: Conspicuous campaign, focusing on the passengers' needs.

Message: We understand the problems of the daily commute and have the solution.

Type of Advertising: Advertising the emotional benefits for the passengers.

Branding: Striking, strong imagery.

Perception of the brand: Close to the passenger, real-life.

Hamburg, Germany – Advertisements:

Ad for Public Transport in Hamburg

Ad for Public Transport in Hamburg

Ad for Public Transport in Hamburg

Analysis:

Overall Impression: Clear campaign, focusing on different aspects of the HVV

Message: The rhythm of the city

Type of Advertising: Advertising the company and the passengers' needs

Branding: Strong Branding through red colour-code, allowing lots of different messages

Perception of the brand: Part of the city, understanding people's needs

Recommendation:

1. We need to define the core brand-values of our brand and communicate them accordingly.
2. We need to develop a layout that is unique for the Riyadh Public Transport
3. We need to define a look that is unique for Riyadh Public Transport
4. We need to define a tonality that is unique for the Public Transport

1.6 Overview of the advertising and media scene in Riyadh

Trends in Media in the Arab world

There are three trends that are shaping the future of media in the Arabian region:

– Consolidation

– Atomization

– Convergence

Consolidation:

Multinational brands are making large acquisitions, local giants emerging through acquisitions, and former competitors forming alliances. Large retailers dominate at the expense of small stores and the popularity of supermarkets is constantly increasing. Multinational media brands and local franchise editions achieve growing presence. The media owners invest in local companies and IPOs. There is also a trend to consolidation in the media sales market: TV ad sales, Print ad sales and soon outdoor will be consolidated. The media market is determined by four agencies that each belongs to main holdings (Omnicom, WPP, Publicis, IPG).

Atomization:

Having a closer look at the consumers, recognize that masses are breaking up into tribes and affinity groups and the personalized content is leading the way to engagement. More brands advertising exist creating more noise across all categories. Brand extensions and micro brands are serving smaller population needs. The TV audience fragmentation is increasing, the Internet consumption increases exponentially and there is a further specialization in print media. To reach the atomized target groups contact points get more specified. There is a high advertising rise in gaming, text messages, public digital screens, Internet/mobile TV and new age media (PVRs, VoD).

Convergence:

More and more technologies (PC, TV, Console and portables) converge into singular devices. In the media landscape there are also changes: web is acting as TV, mobile phones become main media players, news sent by SMS and new revenue streams appear for broadcasters with viewer interaction. Newly created brand assets determine engaging audiences.

Usage of mass media by Saudi Arabians
Reach levels of different media:

Television is the medium with the biggest penetration: it is able to reach 90% of the total Saudi Arabian population. Television is followed by radio (89%); newspapers (68%), weekly magazines (48%) and monthly magazines with a maximum reach of 24%.

	All Pop	Teens	Housewives	Males 25+
Television Max. Reach	90	94	86	91
Newspapers Max. Reach	68	65	59	79
Weeklies Max. Reach	48	49	50	46
Monthlies Max. Reach	24	25	24	21
Radio Max. Reach	89	89	84	92

Reach levels (Source: Saudi Cumulative CTV Sep 06– Saudi NMA 2006)

Internet users in Saudi Arabia:

In the beginning of 2006 about 4.25 million people in Saudi Arabia used the Internet, that means more than 18% of the Saudi Arabian population is penetrated with the Internet. Madar Research and AC Nielsen Internet Study (05-06) expect a computer annual growth rate (05-08) of around 27% for the KSA. The same source declares that almost 70% of Internet users in the Arab world are between 15 and 29 years of age.

The study of Saudi Cumulative CTV Sep 06 – Saudi NMA 2006 confirms this. They elevated that 73% of the Saudi Arabian Internet users are younger than 30 years although they merely have a share of only 65% of the whole population.
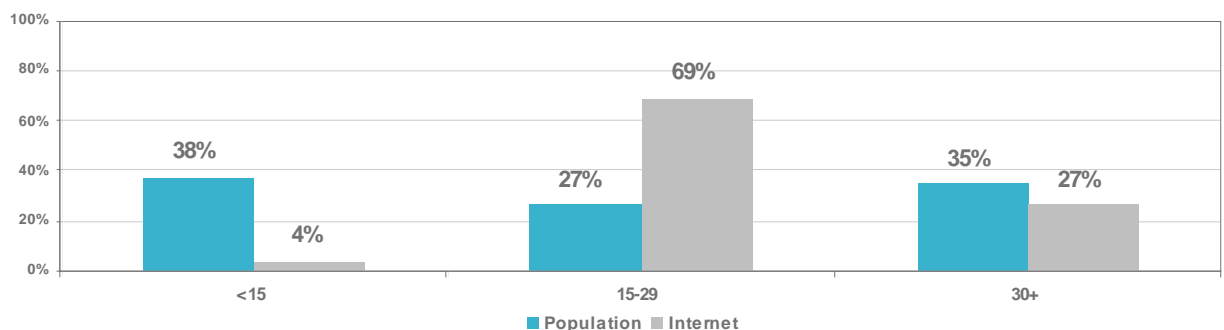
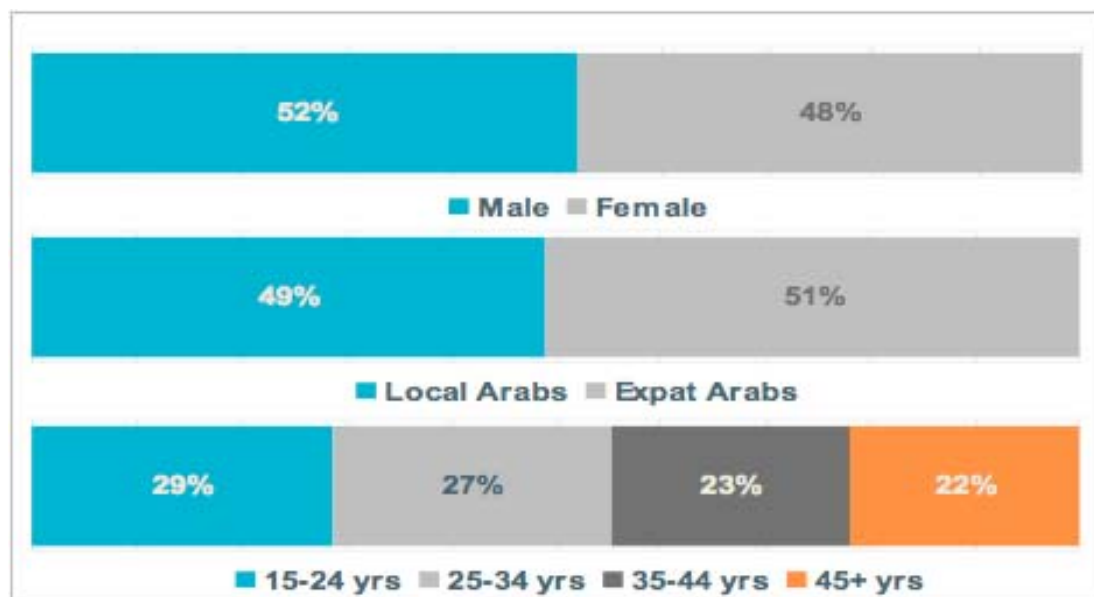*Internet usage by age (Source : Saudi Cumulative CTV Sep 06 – Saudi NMA 2006)*

TV usage:

TV is the medium with the highest media reach. The penetration of dishes amounts 93%, that means more than 9 from 10 households are equipped with a TV satellite receiver. Pay TV has got a maximum reach of 92% and sat TV of 91%. Saudi Cumulative CTV elevated the maximum reach for TV with 90% and local TV is able to reach 89% of all examined households.
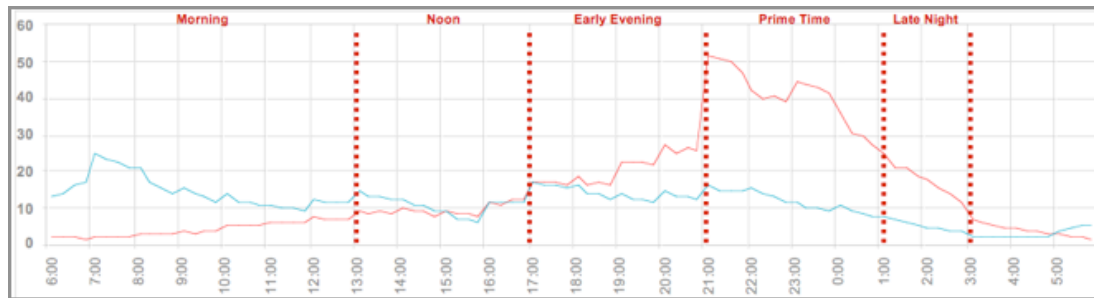
TV indicators (Source: Saudi Cumulative CTV Sept 06)

The TV usages in 2006 by gender and Arab background are evenly distributed. Considering the age pattern there is a small majority in favour of younger TV users. 56% of the compiled population is between 15 and 34 years old.
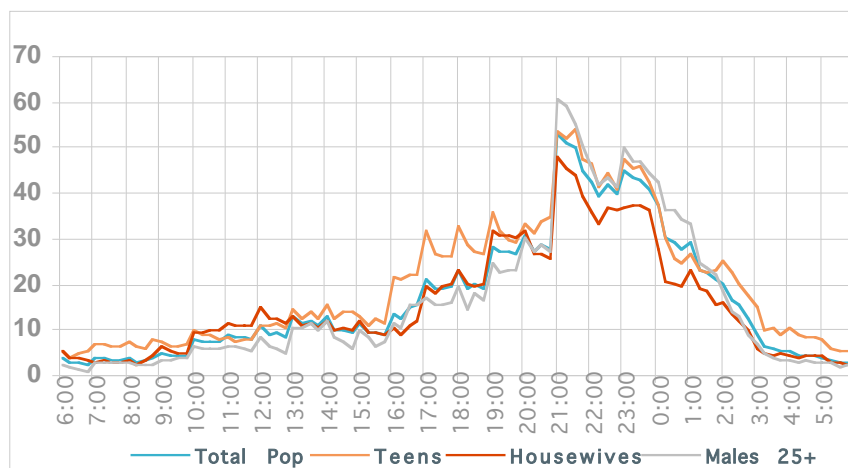

TV-Usage (Source: Saudi Cumulative CTV Sept 06 – Saudi NMA 2006)

The next illustration shows the average Saudi Arabian TV usage in percent in conjunction with day times. The maximum value of viewer ship is at 9 o'clock in the evening. More than 50% of the Saudi Arabian population watch TV at this time. That means the media penetration is very high during the prime time.

Viewer ship pattern (Source: Saudi Cumulative CTV Sept 06)

Having a closer look to viewer ship in central Saudi Arabia, that Riyadh belongs to.
The illustration below depicts the viewer ship of three different viewer groups (male
25+, housewives and teens). Also the total population TV usage is shown.
The running time for all groups is around 9pm. Averagely more than 60% of all male
persons older than 25 years are watching TV during this time. The picture shows
clearly the different daily routines of the groups. For example after 4pm there is a
high rate of TV watching teens. There is an expected connection between end of
school and television consumption.

*TV viewer ship for central Saudi Arabia (Source: Saudi Cumulative CTV Sept 06)*

The figure below depicts the TV viewer ship by genre.

The most popular TV station for general usage is MBC 1. Approximately 30% of
total Saudi Arabian population watch MBC 1. Especially the youth and housewives
of Saudi Arabia like MBC 1, more than 40% teens and around 35% of all

housewives watch this TV station regularly. Housewives also prefer to watch Saudi TV1 in the general TV segment.

In the entertainment TV segment MBC 2 has got a pole position before Rotana Cinemas and MBC 4. Almost 20% of all Saudi Arabians watch this TV station. MBC 2 is particular loved by teens and male persons who are older than 25 years.

Male Saudi Arabian older than 25 years are especially interested in watching news channels. More than 40% of this group receive regularly Al Arabiya and almost 40% of them watch Al Jazeera.
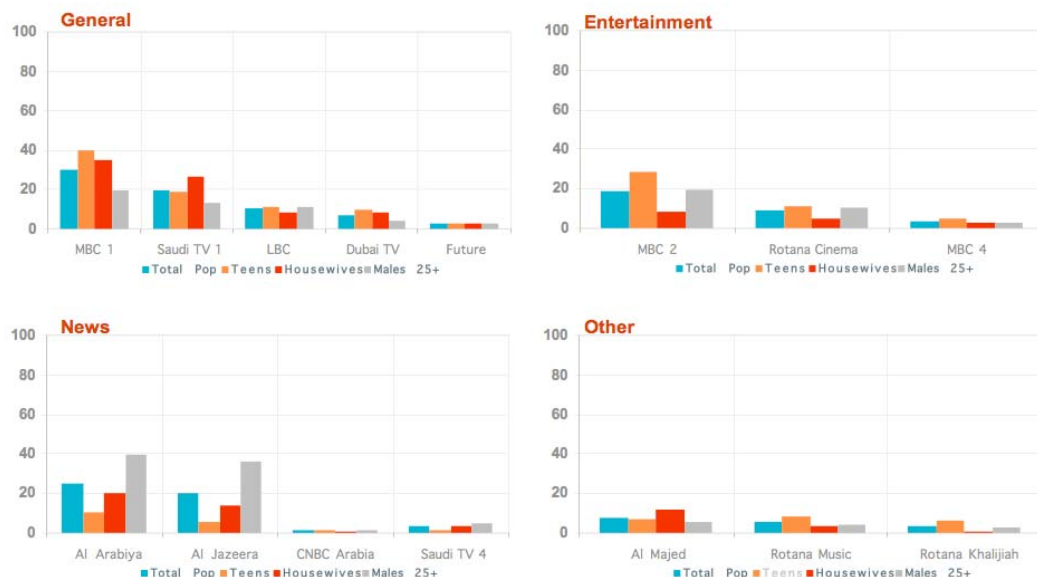
*TV viewer ship by genre (Source: Saudi Cumulative CTV Sep 06)*

Summary: If the Saudi Arabian TV landscape is divided into the categories general, entertainment, news and others, the usage of every division differs significantly. General TV seems to be popular for teens and housewives. Teens also like to watch an entertainment TV channel. And news channels are very popular for male Saudis who are older than 25 years.
This knowledge should be considered when it comes to media planning.

The next illustration shows the results of a survey from Saudi TGI (2005) for TV using. Attitudes and beliefs in television were examined and give mixed results.

TV is basically used as an information medium and for relaxation. More than 50% agreed the question whether TV would be their favourite pastime and 39% admit they would be addicted to TV.

Regarding TV advertisement: 45% declare they would switch the channel if advertisement appeared, 34% say that nearly all TV ads annoy them. But 34% say they often found TV advertising more entertaining than the programmes.
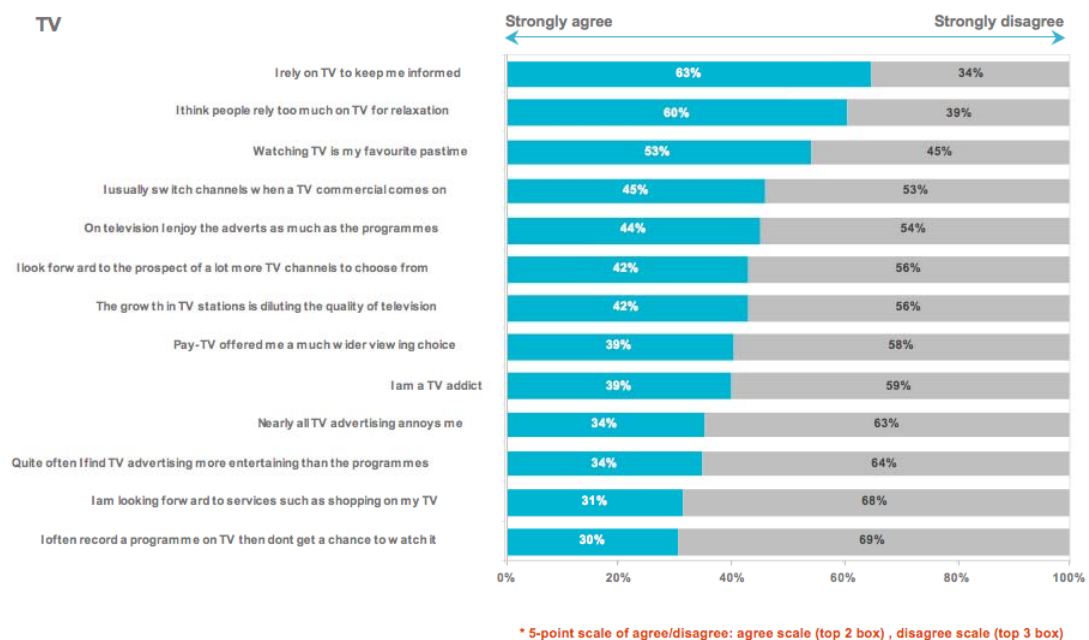

Television (Source: Saudi TGI 2005)

Newspapers:

Historically two national newspapers and a couple of regional smaller ones served the Kingdom of Saudi Arabia. With the fragmentation[1] drive, provincial newspapers took the lead and are now highly influential in delivering audiences in their respective regions.

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[1] Compare: trends in media in the Arab world

Daily newspapers achieve a cumulative media reach of almost 70% of the Saudi Arabian population. Almost 80% of male and approx. 60% of female Saudi Arabians regularly read newspapers. Saudi NMA 2006 also explored the usage by age and classified the spot check into four age classes (15-34; 25-34, 35-44 and older than 45 years). In every age group the newspaper usage is more than 60%.

An appreciable difference is shown in case of newspaper usage by region. In the northern part of Saudi Arabia the newspaper usage is more than 80%, in Medina this value is under 50%. In the central part of Saudi Arabia - where Riyadh belongs to - the usage of newspapers is almost 70%.
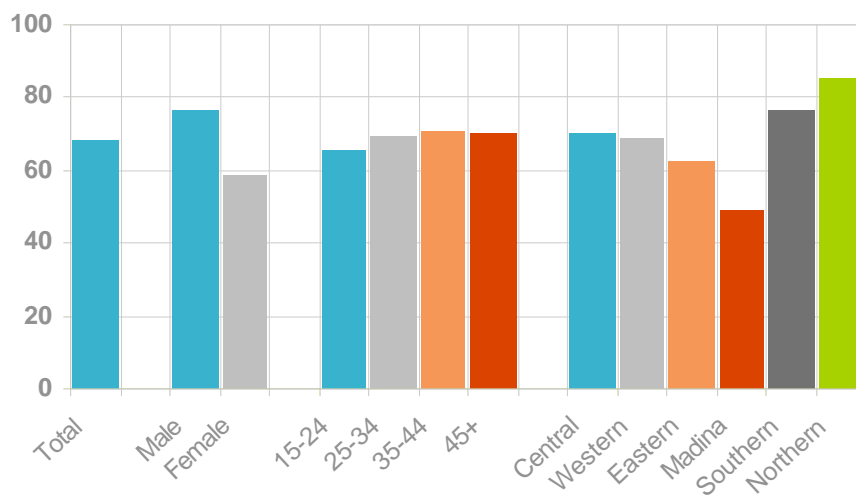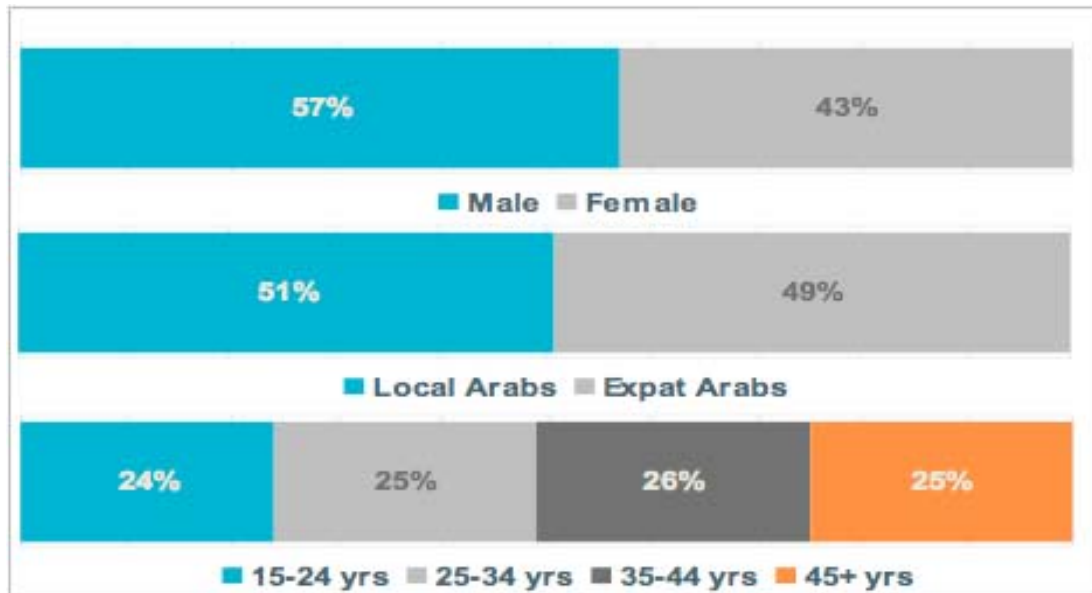

Newspaper readership (Source: Saudi NMA 2006)

Having a look at the newspaper usage in other Arab countries. With a percentage of almost 70% of newspaper readers KSA has a higher quote than Bahrain and Qatar - both approximately 60% - (Sources: Bahrain Multimedia – PARC 2005; Qatar Multi-Media – PARC 2002) and Oman with about 40% of newspaper users (Source: Oman Multi Media – PARC 2006).

Have a closer look at the newspaper users in Saudi Arabia. There is a majority for male readers – 57% of the basic population, but a balanced usage by gender and ancestry of local and expat Arabs.

Another analysis (Source: Saudi Cumulative CTV Sept 06 – Saudi NMA 2006) explored the total newspaper readership with the following conclusion: 57% of the whole newspaper readers are male and 43% are female, there is a majority for

male newspaper readers. In this analysis the usage by age and ancestry of local and expat Arabs is relatively balanced. The percentage composition is shown by the illustration below.

Newspaper usage (Source: Saudi Cumulative CTV Sept 06 – Saudi NMA 2006)

In summary it can be ascertained the penetration of newspapers is comparatively high with almost 70% that means the media penetration is very high. All age classes can be reached, also local and expat Arabs in the same intensity. The higher percentage of male readers could be used as an advantage, because of their opinion leadership. Furthermore the possibility of local specific targeting is important, too.

The next picture shows the average issue readership by region. Central Saudi Arabia where Riyadh belongs to is depicted in blue. Al Riyadh and Al Jazirah are the most popular local newspapers in Riyadh, together with Al Hayat Rhiyadh which is not shown in there.
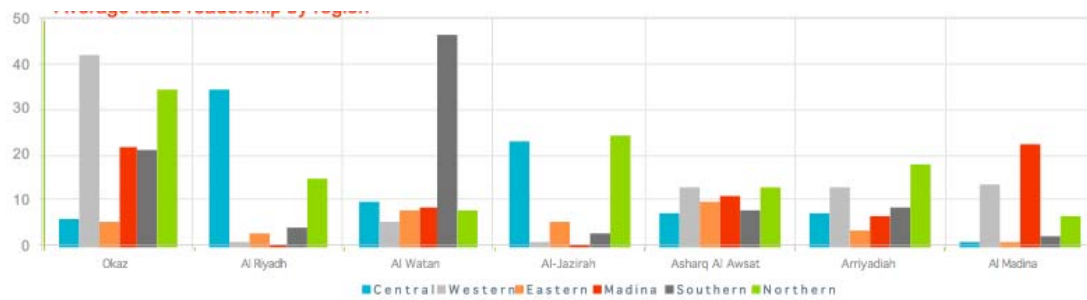
Average issue readership by region (Source: Saudi NMA 2006)

Also some regional newspapers can be considered: Al Watan, Ashraq, as an English newspaper Arab News and Aleqt – an economic one. Also some Asian newspapers in Urdu or Hindi are sold in Riyadh.

Very popular because of jobs, cars, houses, and apartment insertions is the advertising paper Al Wasele with an approximate circulation of 280,000 pieces. This newspaper is delivered for free to households in Riyadh and can be used to reach different target groups.

The following illustration shows the circulation of Saudi Arabian newspapers. Have a closer look to the Riyadh concerning newspapers: Al Riyadh is the newspaper with the widest circulation (91.000 pieces), followed by Al Hayat Riyadh (90.000 pieces) and Al-Jazirah with a circulation of 70.000 pieces. Also shown the gross costs for an advertisement on the front page and the average issue readership. As you can see the front page gross costs for Al Riyadh and Al-Jazirah are equal, the costs for an ad at the front page of Al Hayat Riyadh are less expensive.

	Circulation	Front Page Gross Cost per CC	Avg Issue Readership
Okaz	249,000	325	22.90
Al Riyadh	91,000	325	13.54
Al Watan	123,680	300 (FC/B&W)	10.83
Al-Jazirah	70,000	325 (FC/B&W)	10.47
Asharq Al Awsat	239,280	338 SR (FC) 20 x 3 or 15 x 8 cm	10.44
Arriyadiah	117,063	242 SR (FC)20 x 2 or 20 x 3 cm	9.58
Al Madina	80,000	275 (FC/B&W)	7.91
Al Hayat Riyadh	90,000	196	5.38
Al Hayat Jeddah	60,000	169	5.36
Al Yaum	50,000	300	4.24

* Circulation figures are estimates provided by the publications.

* Front page gross costs are from the rate cards.

Source: Saudi NMA 2006

Saudi TGI explored the beliefs and attitudes for print media users.

The results are shown below.

Daily newspapers are read for information; just 30% say they would read them more for entertainment, but only 41% interviewees rely on newspapers to keep them informed. More than 40% read more than one newspaper and 36% wouldn't change their newspaper.

Almost half of the study participants say newspaper supplements would have really worth and 55% admit they would notice the advertisements in newspapers and magazines. If they were looking for bargains 36% would always have a first look in their local newspaper and 33% often go in for competitions in newspapers and magazines.
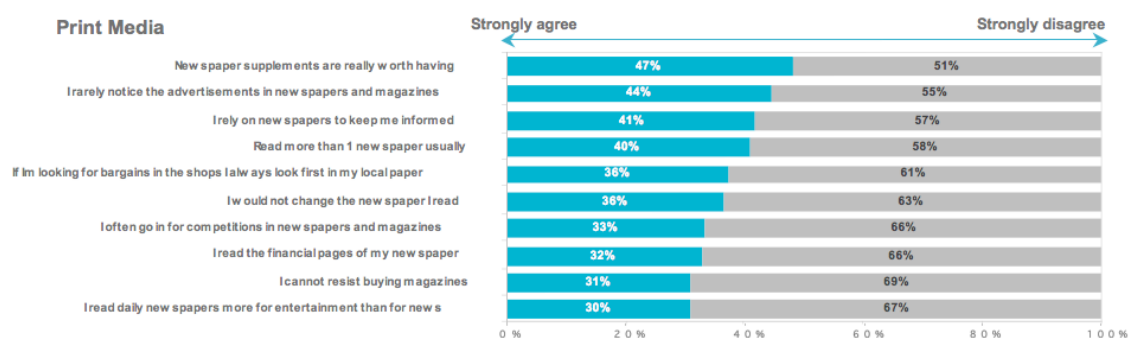
Print media (Source: Saudi TGI 2005)
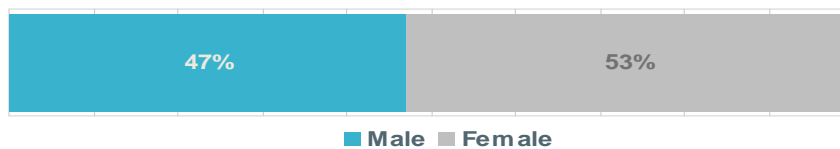
Weekly magazines:
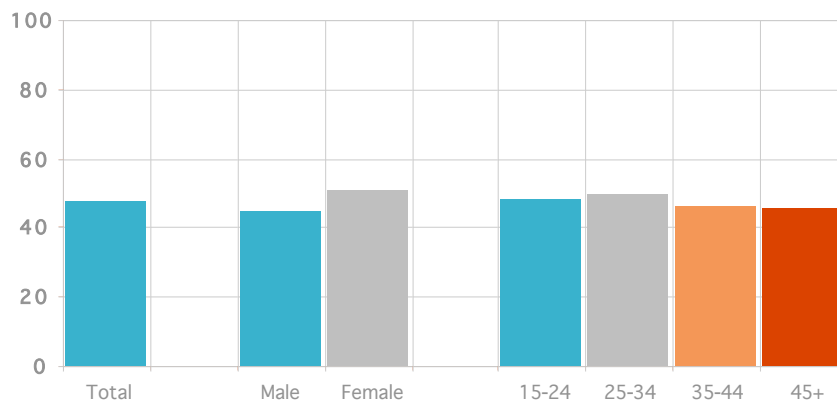

Weeklies profiling (Source: Saudi NMA 2006)

Reading weekly magazines seems very popular in Saudi Arabia. Almost half of the whole population (49%) is reading regularly a weekly magazine. The illustration above depicts the usage of weekly magazines for gender and age as cumulative results. In this analysis there is a small majority for female readers regarding the distribution between the sexes. Also the younger age groups (15 – 24 and 24 – 34 years) seem to be a little bit more interested in reading weekly newspapers than the older classes of age.
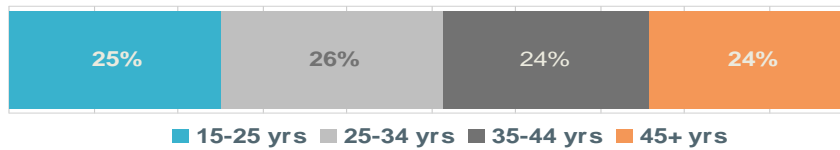
The exact cumulative distribution is shown by the illustrations below (Source: Saudi Cumulative CTV Sept 06 – Saudi NMA 2006).

Usage by gender:

Usage by ancestry:

Usage by age:

25%	26%	24%	24%

■ 15-25 yrs ■ 25-34 yrs ■ 35-44 yrs ■ 45+ yrs
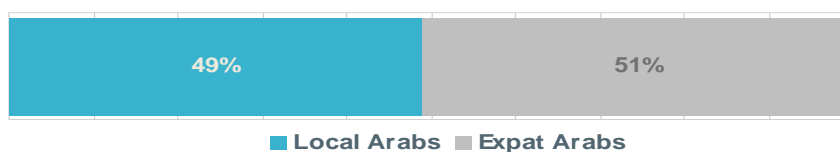
All things considered the distribution of gender, age and ancestry is relatively balanced and weekly magazines are able to reach a huge, heterogeneous target group.
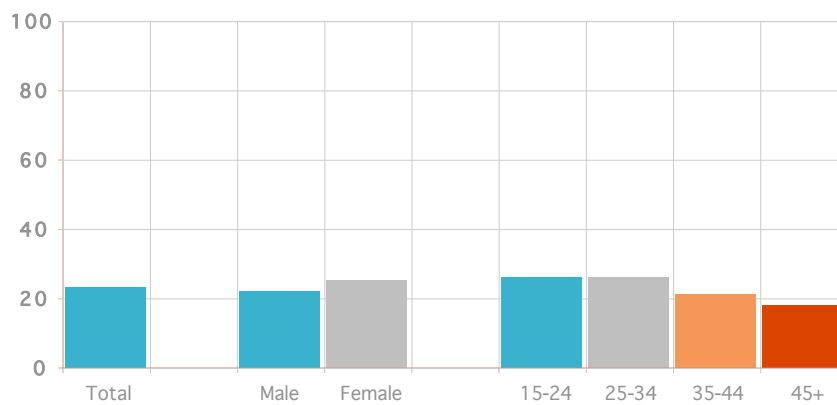
The illustration below shows the top 10 weekly magazines in Saudi Arabia. Sayidaty leads the top 4 groups – more than 15% read this print medium – followed by Zahrat Al Khaleej, Al Waseela and Laha.
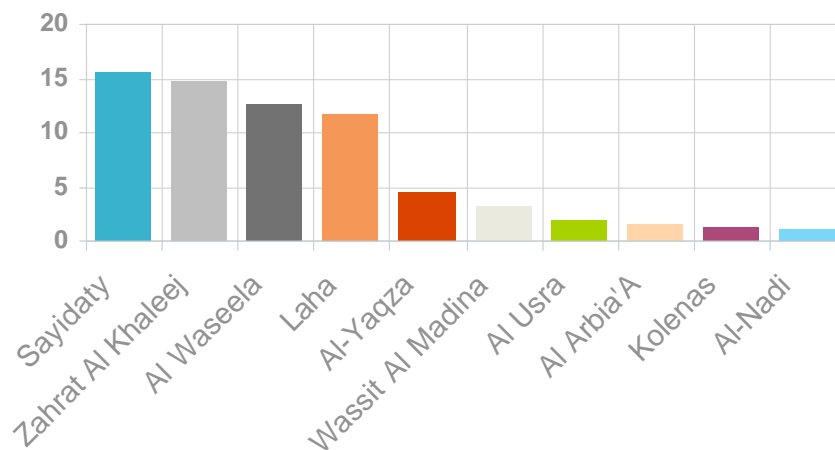
Top 10 Weeklies (Source: Saudi NMA 2006)

Monthly magazines:

According to Saudi NMA 2006 more than 20% of Saudi Arabian citizens are steady readers of monthly magazines.

Monthlies profiling (Source: Saudi NMA 2006)

On closer examination of monthly magazine readership there are some differences in age, gender and ancestry distribution. With 53% there is a small majority for female readers. Also local Arabs seem to prefer reading monthly magazines more than expat Arabs as the illustration below depicts. 56% of all monthly magazine readers are local Arabs. Younger Saudi Arabians are also more interested in reading monthly newspapers. 28% of all readers are between 15 and 24 years old, 29% are in an age between 25 and 34 years. Only one fifth of all monthly magazine readers is older than 45, it seems monthly magazine are not able to attract interest for elder people (+45 years) as for younger ones.

Usage by gender:

Usage by Arabs:
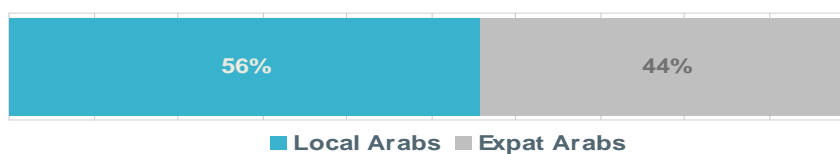
Usage by age:
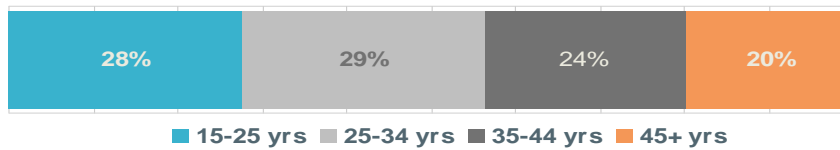
Source: Saudi Cumulative CTV Sept 06 – Saudi NMA 2006

As it is shown by the illustration below the top monthly magazine is Fawasel. More than 5% choose this magazine. Other monthly magazines like Al Jamila, Al Mukhtalif, Hia, Jamalouki Layalina etc. follow.
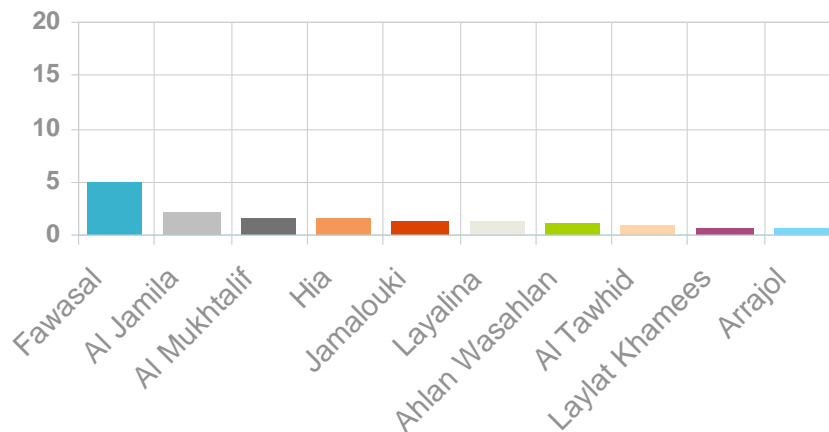
Top 10 Monthlies (Source: Saudi NMA 2006)

Outdoor scene:

Outdoor advertisement is the most expensive medium in Saudi Arabia. The big billboards in the city centre of Riyadh were removed. But still available are unipoles at highways, 3 x 4 metres billboards, ad signs at traffic signs (1,20 x 1,80 metres) and LED screens which are cheap and able to generate a high impact.

The main suppliers for outdoor media are Kassab, Al Arabia and Group Plus.

Promotion:

Generally, promotion is communicating with the public in an attempt to influence them toward buying your products and/or services.

There are a number of promotional objectives, some of the most common being information dissemination, product demand, product differentiation, product highlights, and sales stabilization. Regardless of the promotional objective selected, the company's goal is to inform and convince consumers to buy the product or use the service.

The Arriyadh Development Authority have to educate the promoters. They will be able to answer in personal contact all asked questions the potential clients have regarding the new Public Transport System e.g. timetables, usage, lanes and network, stations etc.

Seizing the idea of the advertising campaign to create a world of service, safety and comfort – the airline idea and character– the promoters should wear uniforms like stewards usually do and assist and help in nearly the same way – friendly and pro-active

These promotion activities supporting the advertising campaign are for example allowed in supermarkets like Carrefour, Hyperpanda or Geant and a very common method to get in contact with potential clients who may have some reservations to a new Public Transport System. With the help of personal contacts we are able to steal the potential new clients´ thunder.

SMS-Marketing:

Mobile Marketing describes marketing on or with a mobile device, such as a mobile phone.

Marketing on a mobile phone has become increasingly popular ever since the rise of SMS (Short Message Service) in the early 2000s in Europe and some parts of Asia when businesses started to collect mobile phone numbers and send off wanted (or unwanted) content.

Mobile Marketing via SMS has expanded rapidly in Europe and Asia as a new channel to reach the consumer. SMS has become the most popular branch of the Mobile Marketing industry with several 100 million advertising SMS sent out every month in Europe alone.

SMS services typically run off a short code, but sending text messages to an email address is another methodology. Short codes are 5 or 6 digit numbers that have been assigned by all the mobile operators in a given country for the use of brand campaign and other consumer services. The mobile operators vet every application before provisioning and monitor the service to make sure it does not diverge from its original service description.

SMS-Marketing is playing an important role as an information and marketing tool. Using SMS is a directly way to achieve the target groups. Nearly everybody in Saudi Arabia owns a mobile telephone in Saudi Arabia. There are tow providers: Saudi Telecom and Mobily, a third one – MTC/ Vodafone haven't started yet.

Other possibilities of using Mobile Marketing are:
- Mobile Marketing via SMS
- Mobile Marketing via MMS
- Mobile Web Marketing
- Mobile Marketing via Bluetooth
- Mobile Marketing via Infrared
- Location Based Services
- User Controlled Media
- Mobile Viral Marketing

The future of Mobile Marketing:

According to a survey conducted by a mobile marketing provider, approximately 89% of major brands are planning to market their products through text and multimedia mobile messaging by 2008. One-third are planning to spend about 10% of marketing budgets through mobile marketing. Also, in about 5 years over half of brands are expected to spend between 5% and 25% of their total marketing budget on their mobile marketing. Already, 40% of the firms that responded have implemented this feature for their audiences.

What will and already has given mobile marketing's attraction are:
The ability to reach a specific target audience; information about how the user responded to a marketing message;
and proof that a message has been received by the user's handset.

In the case of the Arriyadh Bus Transit Design Project Mobile Marketing / SMS Marketing could support and provide the population of Riyadh / a huge number of potential new clients with advertisement and of course information about the new Public Transport System, how it works, what is the service about, etc.

SMS-Marketing is playing an important role as an information and marketing tool. Using SMS is a directly way to achieve the target groups. Nearly everybody in Saudi Arabia owns a mobile phone. There are two providers: Saudi Telecom and Mobily, a third one – MTC/Vodafone haven't started yet.

Media investment dynamics:

As the illustration below depicts, the media investment in all category groups has grown every year by millions. It is expected that this growth will continue.
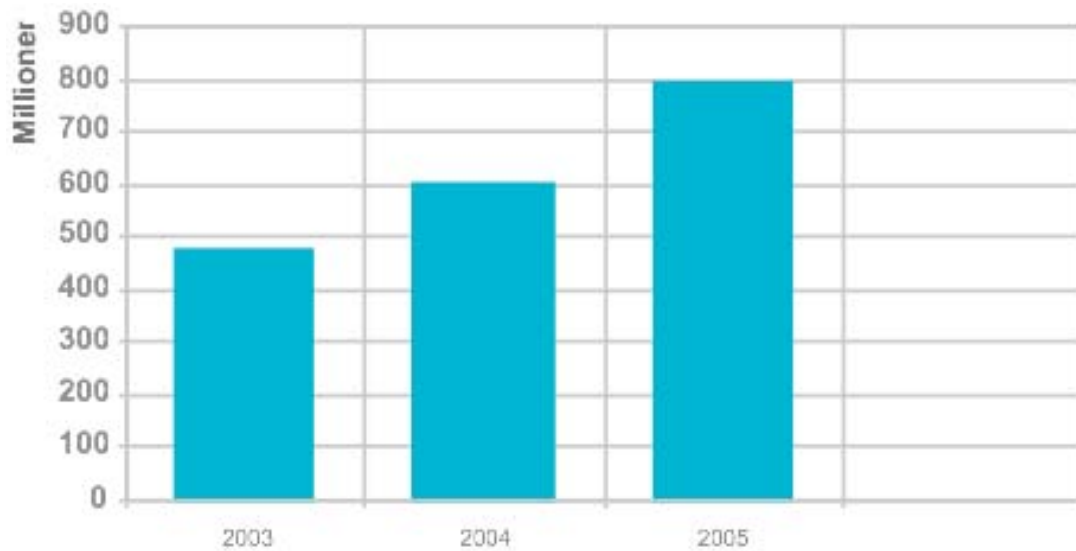
Year on year growth (Source: Ipsos Stat Monitoring Data)

The next picture shows the percentages for specific media of total media investments in Saudi Arabia. As it is depicted the highest percentage in 2006 is hold by newspapers followed by outdoor media, radio, TV and magazines. Advertising investments are possible only since 2005, but it seems they will grow further and take off newspaper shares.
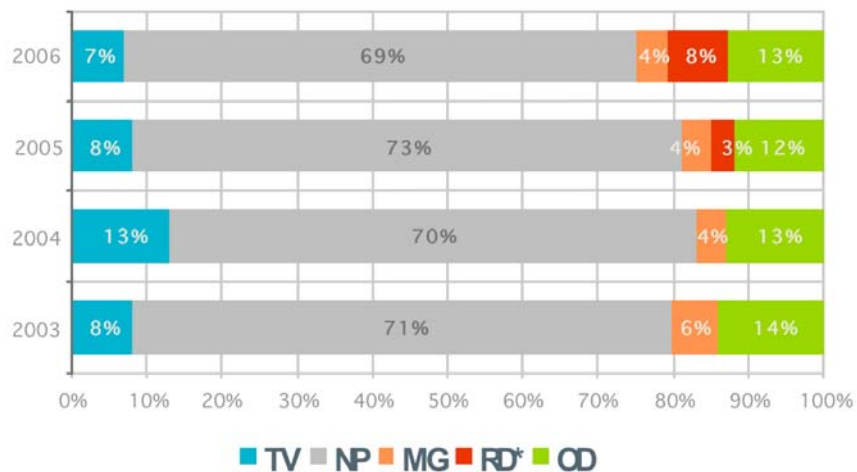
* Radio & Outdoor are not fully monitored

Media investments development (Source: Ipsos Stat Monitoring Data)

The next illustration gives an overview of top media investing product categories. There is no category that is in direct competition to a new public transport provider. These circumstances offer a huge chance for the new public transport system in Riyadh, because there are no topical rivals and all information that will be given is new for the target groups.

Rnk	Top Categories Ytd	$Million	Rnk 05	% Change*
1	Construction	72,545	1	45%
2	Real Estate	63,131	4	56%
3	Holiday Resorts	39,892	2	-11%
4	Banking	39,308	3	1%
5	Cars	37,519	5	8%
6	Diversities	36,458	13	93%
7	Cellular Phones & Accessories	30,283	7	13%
8	Educational Institute	28,497	14	34%
9	Car Servicing	23,187	12	9%
10	Restaurant	22,777	8	-4%
11	Computer & Accessories	22,408	16	20%
12	Publishing & Catalog	20,293	6	-25%
13	Finance	18,809	17	37%
14	Commercial Center	18,715	9	-9%
15	Exhibition & Events	17,697	10	-13%
16	Jewellery	15,013	18	18%
17	Furniture	14,868	20	24%
18	Watches	14,760	11	-11%
19	Telecommunication	14,689	30	109%
20	Airlines	12,931	21	15%
21	Television	12,430	24	9%
22	Theater & Cinema	12,360	15	-26%
23	Public Sector	11,219	27	14%
24	Servicing Companies	11,160	29	47%
25	Medical Servicing	10,731	23	-5%
26	Video Equipment	10,274	25	-9%
27	Electrotechnology	10,211	19	-34%
28	Fragrance	9,518	22	-19%
29	Trading Companies	8,522	32	43%
30	Men & Women Clothing	7,926	28	-6%

* % Change: Jan-Sep 2005 vs. Jan-Sep 2006

Top media investing categories (Source: Ipsos Stat Monitoring Data)

1.7   Core messaging

The Public Transport of Riyadh is a user-friendly system that takes people quick and safe through the city.

2   Creative core idea

2.1   Mission and vision statement of Public Transport

The mission

Our marketing- and strategic-starting-point is clear:

-   Establishing an advanced and modern public transport system for Riyadh.

-   Developing it to an integrated and generally accepted system that is part of the overall Public Transport Plan of Riyadh.

-   Both in reality and perception.

The vision

Carefree and secure transportation for all.

2.2   Brand essentials of Public Transport in Riyadh

Setting the basis for broad public acceptance of public transport and conveying a positive image of the bus system.

Let's have a look at Riyadh:

- The Capital and largest city of Saudi Arabia.

- It is a dynamic metropolis and one of the fastest growing cities in the world.

- Riyadh's history goes way back in time, serving as the old residence of the Saudi kings with fine architecture and lush gardens.

- The city is packed with cars, with dramatic increase over the next years.

Due to financial and cultural reasons parts of the population do not use cars.

Let's have a look at the Bus System:

- At the moment there is no official public transport in existence.

- The bus company SAPTCO is currently the only mode of transport but is not able to transport the masses.

The essence of a new Bus System:

- Implementation of public transport for a fast rising metropolis like Riyadh.

- A positive image is essential for the general acceptance of the public bus system.

- A legitimate name creates faith in the new public service.

2.3   USP / Benefit

The USP (Unique Selling Proposition) defines the competitive advantage of a product or a service and defines the positioning.
Positioning is about making your service offering different from, and more valuable than, the competitors' offerings--and placing the idea in the minds of a target group of customers. Positioning attracts customers by creating a positive and unique identity for your company and its offerings. Positioning is vital for distinguishing your offering from everybody else's.

The basis for a strong USP is the customer value proposition.

Have you created a new product or service? Ask yourself why. What customer value have you created? Was it to offer something radically new to the market, or to fulfil needs customers were voicing?

In developing the marketing message, it's very helpful to develop the Unique Selling Proposition, or USP.
The USP very clearly answers the question, "Why should I do business with you instead of your competitors?"

The USP may be used repetitively in your marketing literature to build the customer's or client's identification of your company with your product or service.

For the Arriyadh Development Authority / the new Public Transport Service the USP is clear:

The one and only reliable and affordable public transport for Riyadh´s citizens.

The benefit describes the advantage and profit the customers earned by using the service or product.

Safe and secure public transport for all.

For the implementation of the Arriyadh Bus Transit Design Project we have the strong advantage that there is no real competitor in Riyadh for providing a reliable, affordable and safe Public Transport Service.
The new created Public Transport Service is unique for Riyadh.
The USP and benefit are clear – the residents should use the buses to travel on time, safe and in affordable and comfort way.
These are potent and powerful advantages that this new service has in contrast to the minor competitors taxis and coasters.

Long-term strategy

After launching the new service and the announcement and creating awareness for this new Public Transport Service in Riyadh it is very important to

Marketing should be built on a firm long-term marketing strategy, which is to be placed at the forefront of the company, guiding all its development activities, marketing activities, communicational activities and actions.

While specific marketing tactics are needed as well, they should be based on the long-term strategy, integrating all key marketing areas: sales, advertising and promotion, public relations, customer relationship management and complete external and internal company communications.

The strategy should especially include the following:

- Company mission statement and vision
- Target audiences definition and evaluation
- Company identity
- Purpose of marketing
- Market evaluation
- Business environment evaluation
- Long-term strategic goals
- Key competitive advantages and their further long-term development
- Marketing models
- Marketing process
- External and internal communication guidelines
- Client relationship management guidelines
- Evaluation and role of key marketing areas (sales, advertising and promotion, public relations, customer relationship management, complete external and internal company communications)
- Allocation of marketing resources, including the marketing budget
- Controlling guidelines

Launching the brand campaign:

The introduction of our brand will start after the first big improvements will be visible on the streets of Dubai.

3   Name and logo for the Bus System

3.1   Naming

Bus Al Riyadh

- This service is the first public bus transport for Riyadh, and as we have to tell people that it is a bus we have to simply call it **"Bus".**

- **"Al"** as the Arabic form of "of" conveys the meaning of the one and only bus system for Riyadh.

- And obviously we include the city's name **"Riyadh".**

"Bus Al Riyadh" emphasizes the system as the one and only transport for Riyadh and has the feeling of an Arabic name, yet easy to understand for non-Arabic people.

3.2   Logo

Requirements for a logo for the Public Transport:

- One day the bus system will be an integrated part of an overall public transport system for Riyadh.

- Next to an overall brand identity for the operating company several sub-brands will be needed for the different modes of transportation: bus, metro, taxi,...

- Therefore the bus logo of today should be highly adaptable for the transport services of tomorrow.

- It should also convey the meaning of the services to people who cannot understand Arabic respectively English.

The Bus Logo:

The Bus Logo with a colour:

The plain Logo introducing purple.

The Bus Logo with an icon:

A dynamic bus serves as the logo for general advertising use.

The Bus Logo bilingual:

The bilingual logo will be used when there is only one single medium,

e.g. sponsoring use.

The Bus Logo + authority name:

Adding the name of the public transport authority will convey graveness to the logo where it is useful, e.g. in public announcements or at bus stops.

3.3   Possibility of a sublogo range for the Public Transport

The Public Transport logo family:

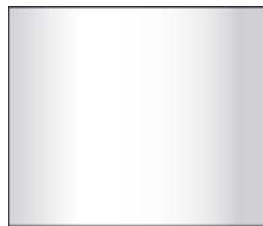The logo is highly adaptable for other modes of transport.

4   Definition of a brand appearance

4.1   Colour code

The colour of the bus logo is purple. A colour with an announcing character, yet friendly and warm. Simply put the perfect colour for Bus Al Riyadh.

BUS AL RIYADH

The second colour for a modern look is silver / grey:

4.2   Typeface

Bliss

As a modern dynamic typeface.

This is a headline.

*A B C D E F G H I J K L M N
O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p
q r s t u v w x z
0 1 2 3 4 5 6 7 8 9 . , ! ?*

Meta

As a possible typeface for the

overall public transport brand.

Public Transport Authority

*A B C D E F G H I J K L M N
O P Q R S T U V W X Y Z
a b c d e f g h i j k l m n o p
q r s t u v w x z
0 1 2 3 4 5 6 7 8 9 . , ! ?*

4.3   Imagery

To define a look for a brand we need to define the look of the images concerning:

- Colour
- Positioning
- City and Lifestyle
- People

Colouring:

The colours in the imagery should be warm and friendly, as to benefit a company that cares for its customers.

Positioning:

- When a bus is shown we have to put it into scene.

- The emotionality of the images has to be transmitted to the observer.

- Passengers should feel proud to sit in such a great vehicle.

- They should feel special since we introduce the first public system in the city.

- The images need to be modern to present a modern, rapidly growing Riyadh.

City and Lifestyle:

- We want to convey an urban and modern lifestyle.

- It has to reflect the ambitious goals of the launch of the public bus transport.

4.4   Tonality

- Smart   but not loud.

- Reasonable   but not boring.

- Entertaining   but not flashy.

- Volkswagen   and not Rolls-Royce.

- Matt Damon   and not Bruce Willis.

5   A general campaign for the Bus System

5.1   Announcement of a new Public Transport System to the public

- Until the target groups do not know the new public bus service we have to inform them.

- In order to set a topic we need to come up with fresh images that tease the population of Riyadh.

- The communication should be aimed at all target groups.

- A humorous approach will help to sympathize with the service.

5.2   Information and Image Campaign

The new public bus service is in town!

The claim: **It's all ride!**

- A claim that gives you a good feeling.

- A pun that makes sense.

- Highly entertaining, yet right in it's message.

- The claim will not be translated word by word into Arabic, but adapted.

The objectives of an awareness campaign are:

- Create awareness and induce trials

- Launch the new service and create acceptance in the society

- Provide residents of Riyadh with the facility of New Bus Transportation System

The Challenges of an awareness campaign are:

- Develop No Waste strategy

- Drive the consumer buzz via media creativity

- Deliver high-end planning efficiencies

- Provide sufficient coverage

- Deliver Impact & Awareness

    = Attain multiple exposure values

The announcement – teaser motive:

Ad/ Motive „Teaser"

TV teaser spot "Float", 20":

A street scene. The camera aims steadily at the scene. After a few seconds some people drive into the picture in a strange way. They float above the ground as if they are guided by an invisible hand. They stop. The ride goes on after a few seconds. Cut. White screen.

(Super:)   Ready to take off?

The Awareness campaign:

Ad/ Motive "Awareness"

Solution motive:

Ad/ Motive "Solution"

TV follow-up spot "Ride", 20":

The same scene of the teaser spot. The people drive into the picture. But this time a bus is coming to the stop. The bus drives into the centre of the picture and drives away with the people sitting inside the bus. The logo and claim come into the picture.

(Off:)   Bus Al Riyadh. It's all ride.

Image motives:

To create a positive image we need to show the benefits of the new bus system:

- Enjoy the drive with your family instead of focussing on the traffic.

- Zip through traffic with priority lanes.

- Modern buses and technologies for your safety.

- A comfortable ride.

- Everyone is invited to use the public transport.

Motive "Priority Lane":

The way is clear!

Experience a bus service that gives the feeling of an airline. You will reach your destinations fast, safe and affordable.
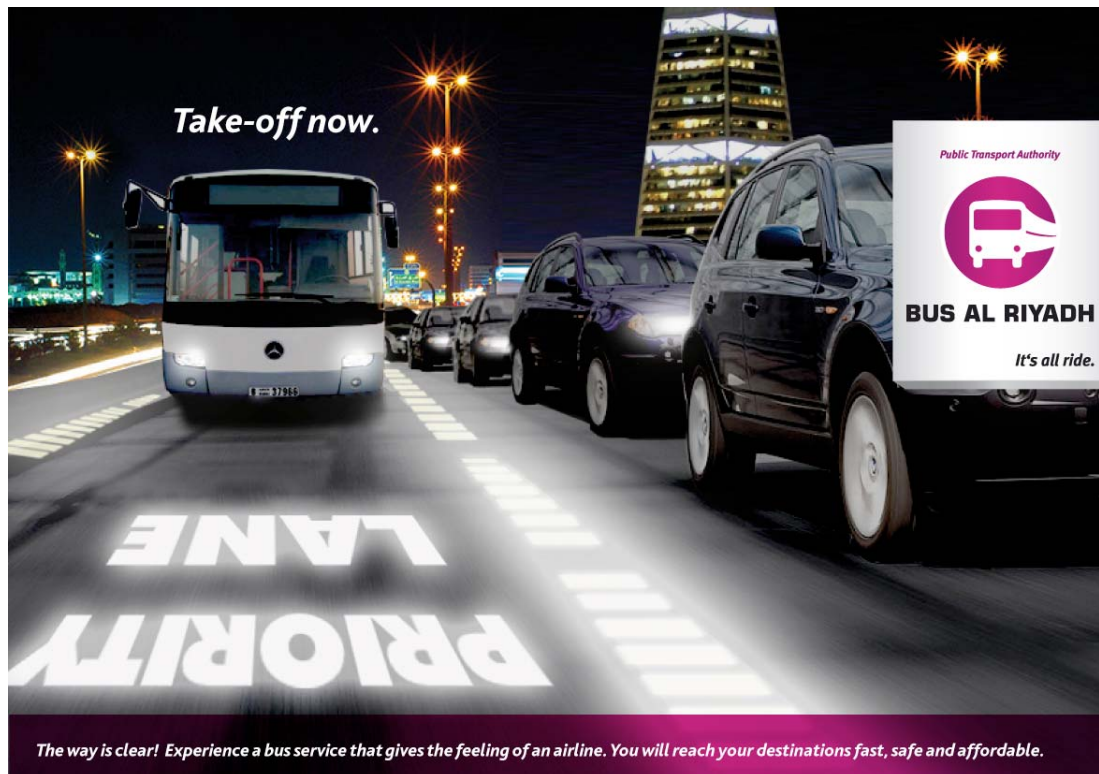
Ad/ Motive "Priority Lane"

Motive "Safety":

Ride safe with us!

Experience a bus service that gives the feeling of an airline. You will reach your destinations fast, safe and affordable.

Ad/ Motive "Safety"

Motive "Enjoy the Ride":

Relax with us!

Experience a bus service that gives the feeling of an airline. You will reach your destinations fast, safe and affordable.
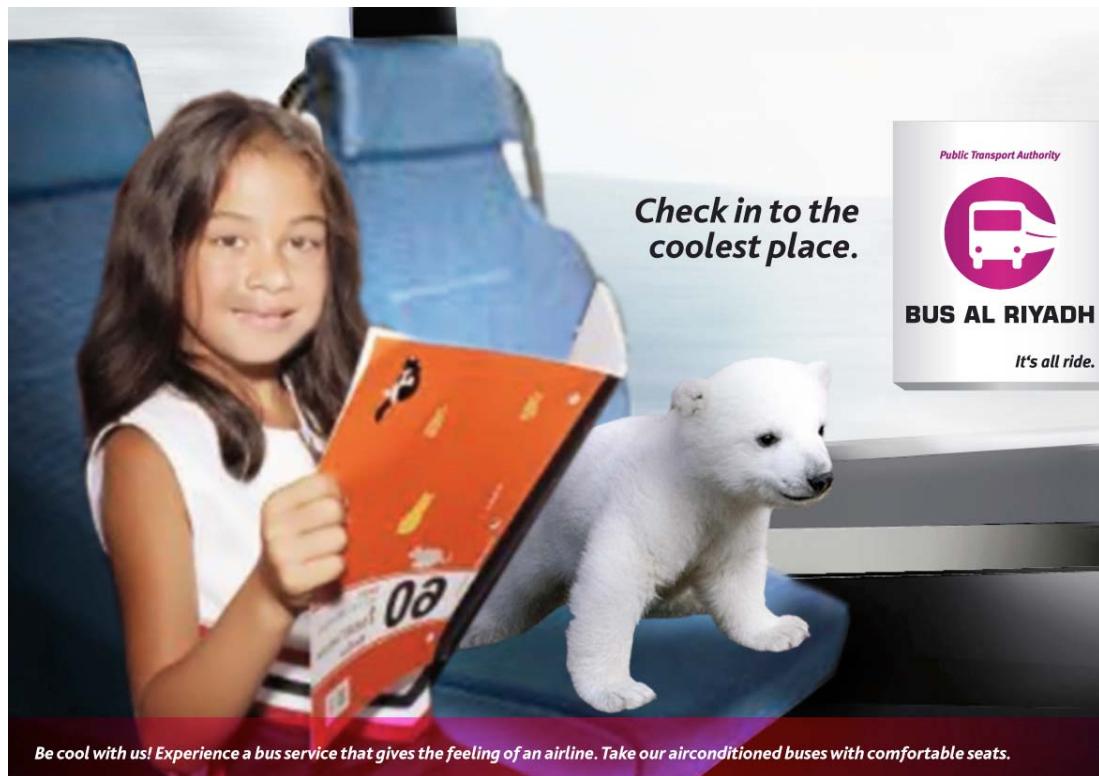

Ad/ Motive "Enjoy the Ride"

Motive "Comfort":

Be cool with us!

Experience a bus service that gives the feeling of an airline. Take our air-conditioned buses with comfortable seats.

Ad/ Motive "Comfort"

Motive "Come Together":

Connect with us!

Experience a bus service that gives the feeling of an airline. You will reach your destinations fast, safe and affordable.

Ad/ Motive "Come Together"

Motive "Finish Line":

Hurry up! We take off on time.

Experience a bus service that gives the feeling of an airline. As you
will reach your destinations on time – safe and affordable.

Ad/ Motive "Finish Line"

Take a look into the future of the network

- After the successful introduction the system will be on its way to an extensive public transport.

- The network will be the backbone of the transport system, covering the whole of Riyadh.

- Therefore we will need an image as well.

Motive "Network":

Come fly with us!

Experience a bus service that gives the feeling of an airline. You will reach your destinations fast, safe and affordable.
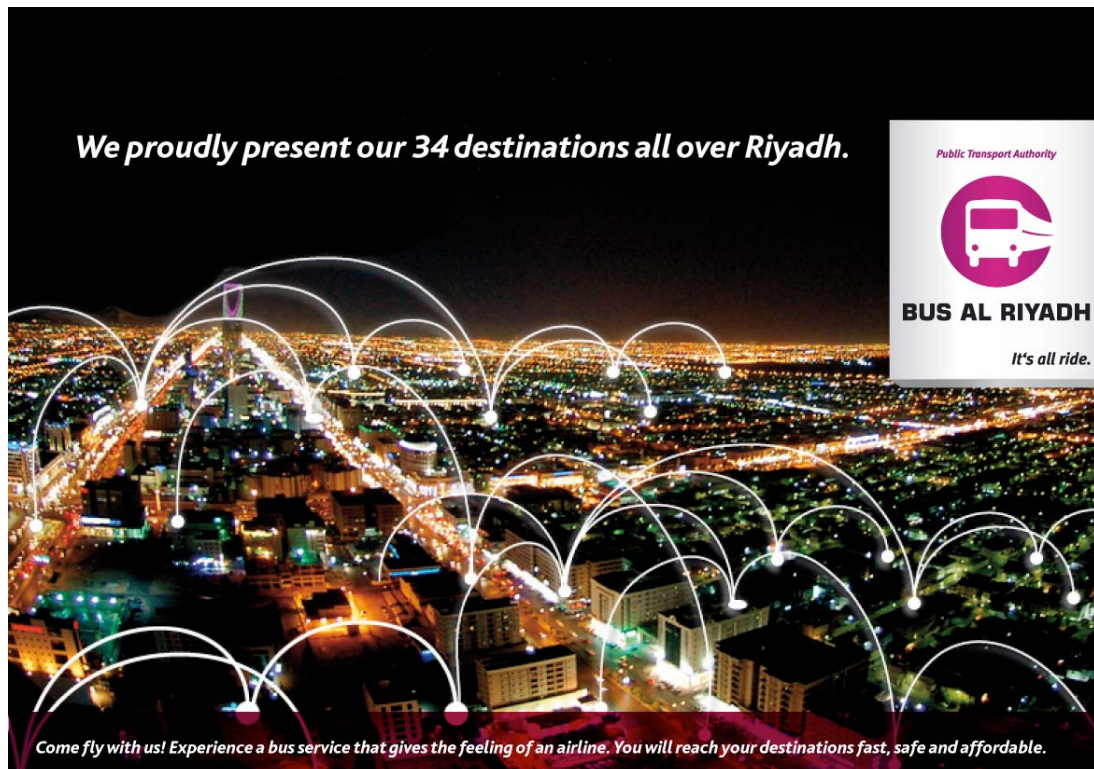
Ad/ Motive "Network"

TV spot "Split", 45"

Two storylines that develop simultaneously over the same period of time. One is very static and boring, the other one is moving and seems very fast.

Two brothers come out of their house. They go into two different directions. The screen splits. The one who went left, gets into his car, drives for one second and gets stuck in a traffic jam. Nothing else happens except for the man getting more and more annoyed. Towards the end the street gets clear, he starts to speed, the police comes and he gets a speeding ticket. The other man gets into the bus, gets off at a nice restaurant, has a delicious meal, gets into the bus again, meets some friends and reaches a football stadium. He gets in and cheers for his team.

Cut. White screen. (Super:)"Be there first." (Off:) Bus Al Riyadh. Its all ride.

Cut. The man comes out of the stadium. The other one gets out of his car. They meet at the bus stop. The screen unifies. They get in and laugh.

5.3   Marketing Ideas with PR Effects

Below the Line activities:

- To convince Arabs to use the bus.

- To let women take the bus.

- To disprove the image that taking the bus is not cool.
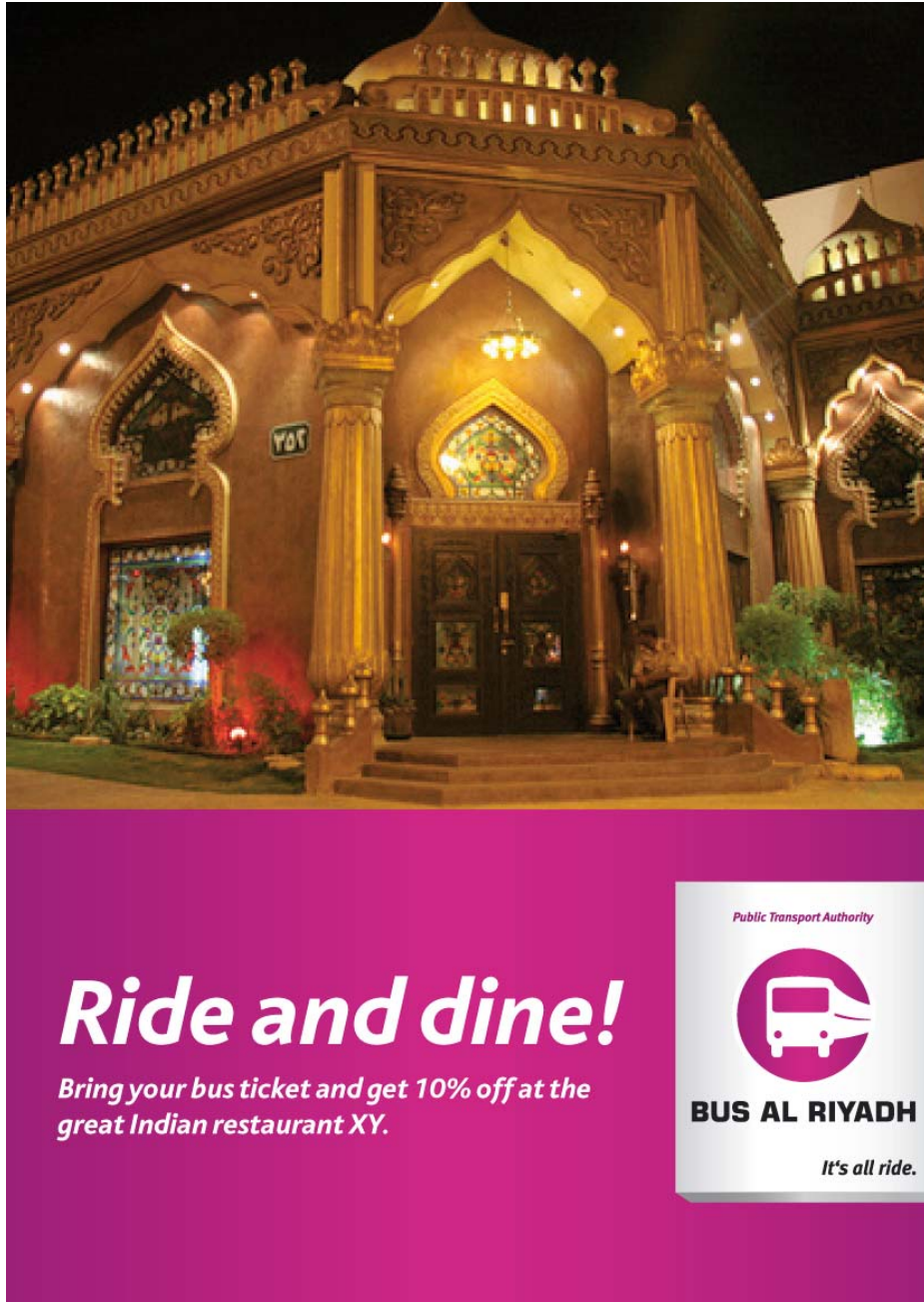
Welcome Kit:

Welcome Kit including: Pen, refreshing tissue, network map, "Ride-for-free" ticket

Welcome Kit

How to get the people into the bus?

-   Give them what they want. Give them something for free. Who can resist?

-   Ride and dine promotion:

-   Bring your bus ticket and get 10% off at the great Indian restaurant XY.

Ad/ Motive "Ride and dine"

Get the women into the bus:

- Women are not allowed to drive. Taking a bus would give them more mobility, and their husbands less driving stress.

- The motives „Safety" and „Comfort" are the first steps to influence their husband's views.

- Here comes the second step...

Ride and win:

Ride and win promotion:

For all the ladies: send in your bus tickets and win an amazing trip to London for you and your husband.

Ad/ Motive "Ride and win!"

Buses are not considered cool:

- Most of the people do not think that taking the bus is cool

- We will prove them wrong.

- There are lots of young people who we will influence to take on a new habit by taking the bus, instead of using their car all the time.

Pimp my ride!

- We will have a co-operation with the newly launched network MTV Arabia.

- Together with MTV and Bus Al Riyadh school classes will create graffiti buses with a famous graffiti artist.

Logo MTV Arabia

Bus with Graffiti

Pimp my ride No.2!

We will go live to L.A. and connect it to Riyadh via MTV Arabia. One of the most famous pop stars will be the patron of our project, e.g. Justin Timberlake sitting in a bus and talking to one of the most famous sport stars from Saudi Arabia, e.g. Yasser Al Qahtani in Riyadh.

The kids will sympathize with the bus-loving stars and through that with Bus Al Riyadh.

Justin Timberlake und Yasser Al Qahtani

Making the service public:

- Promotion at malls to show the people our great service.

- We will install bus stops at malls, where our friendly bus drivers will give away flyers, network maps and overall information.

- The Ride and dine promo will also take place on this occasion.

- To highlight the air-conditioned comfort we give away soft toy polar bears to the kids.
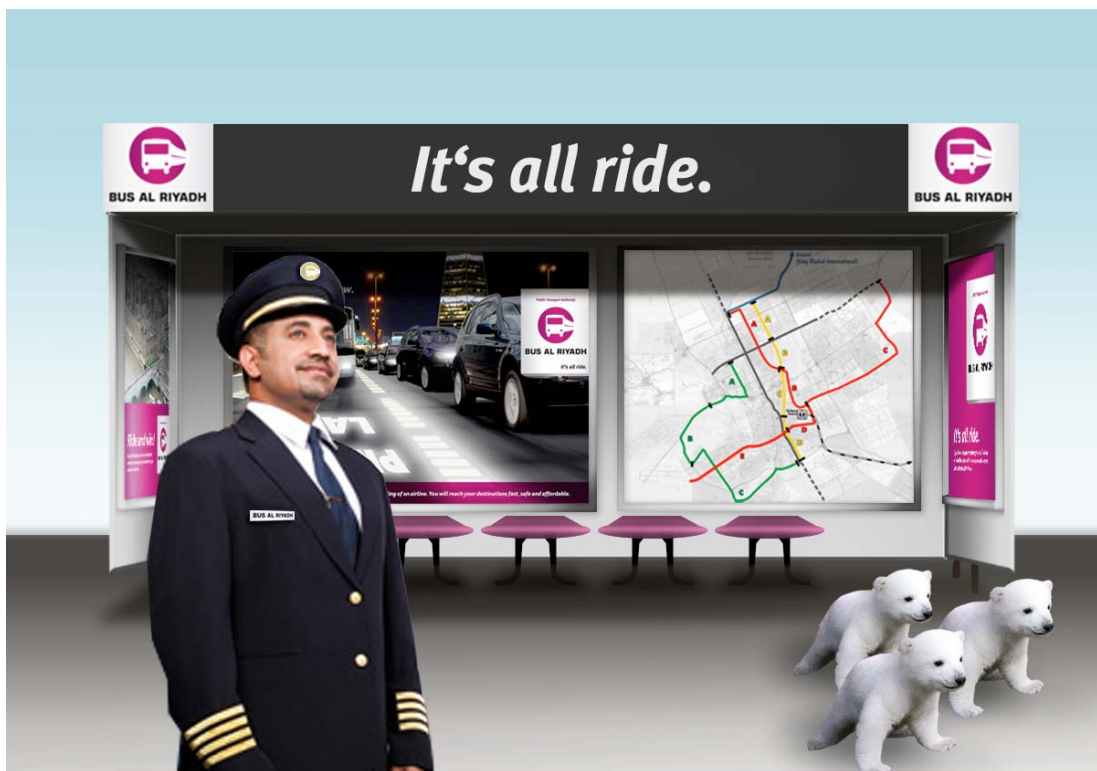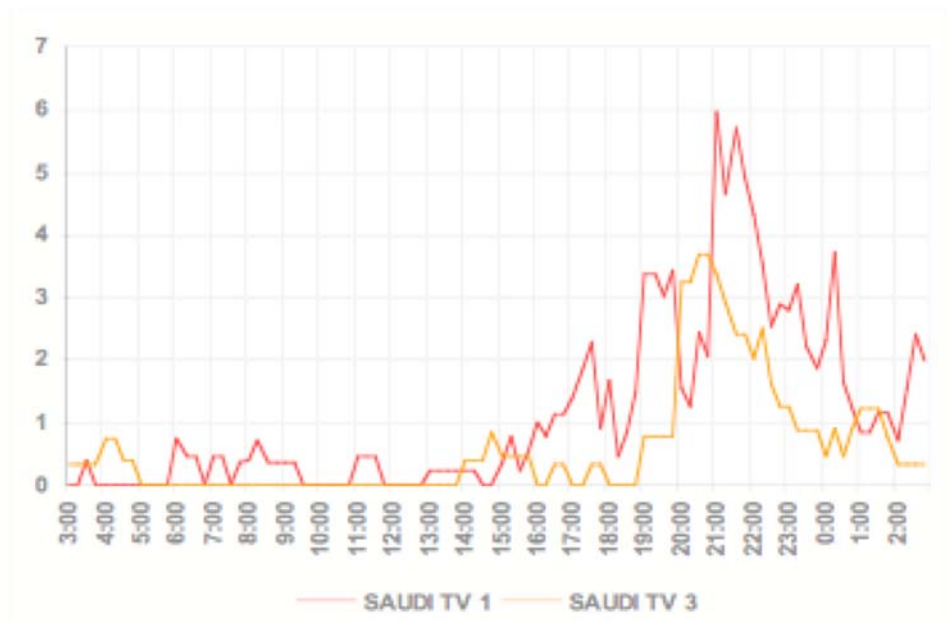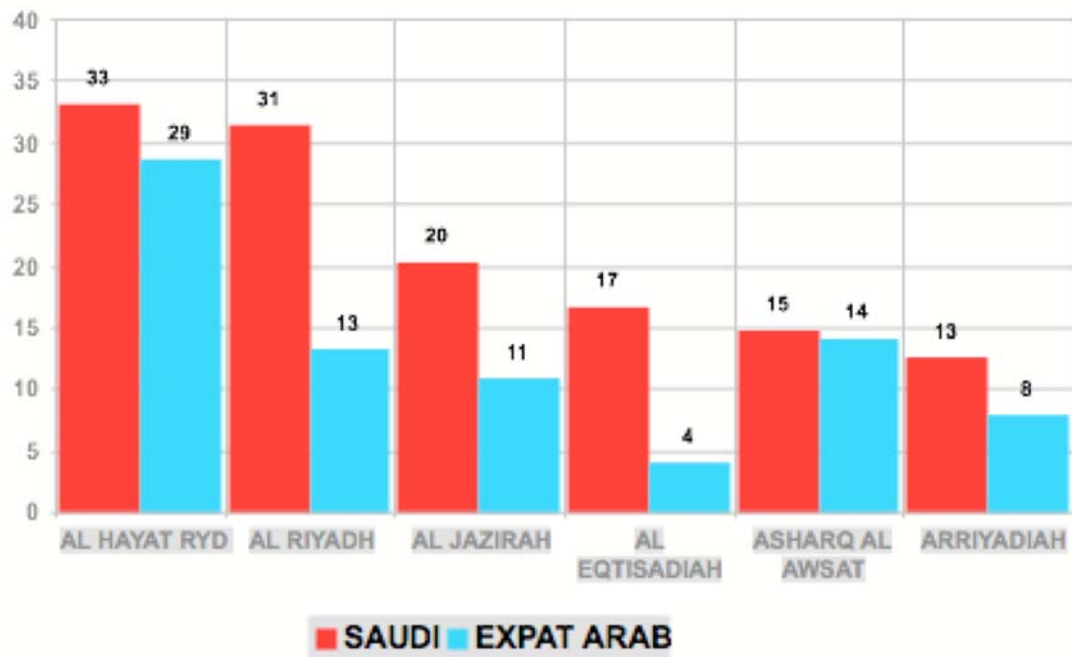

Making the service public

5.4 Media Plan and Timeline (Announcement/ Information and Image Campaign)

Media strategy:
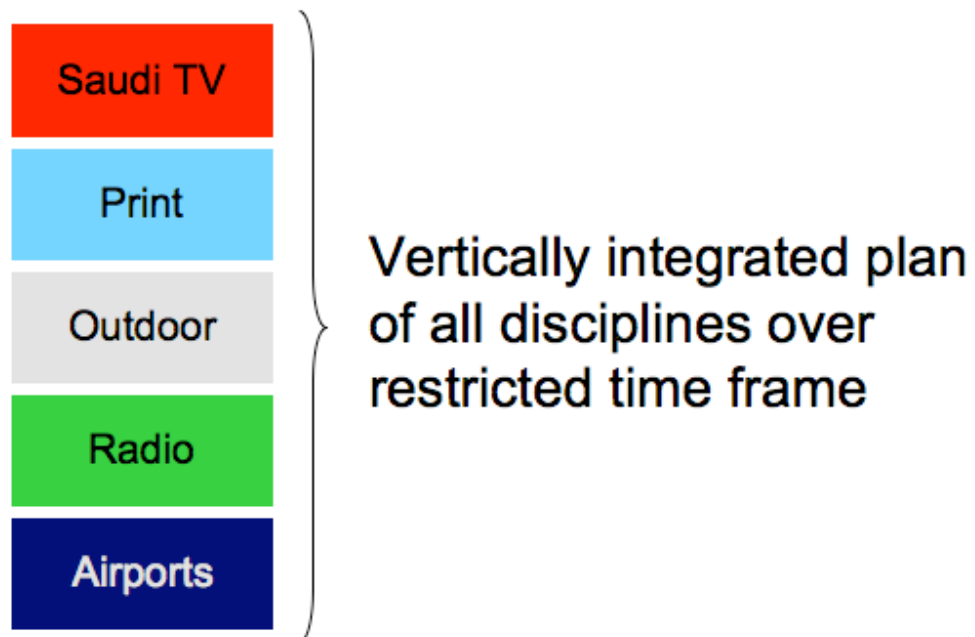
**TV viewer ship on an average day:**

TV viewer ship on an average day

Daily Newspaper average readership – Central region:

Daily newspaper average readership - Central region (Source: Saudi NMA April 2007 TG: Saudi Males, Below 6000 income Age 20+)

*Non Arab expatriates population is estimated about 15%, not covered in any recent readership or viewer ship survey.

Arab News English Language, Arab News Pinoy Extra Philipine language, Urdu News Urdu Language & Malayalam Indian Language only top read newspapers/supplements in the country.

Weekly Magazine average readership – Central region:
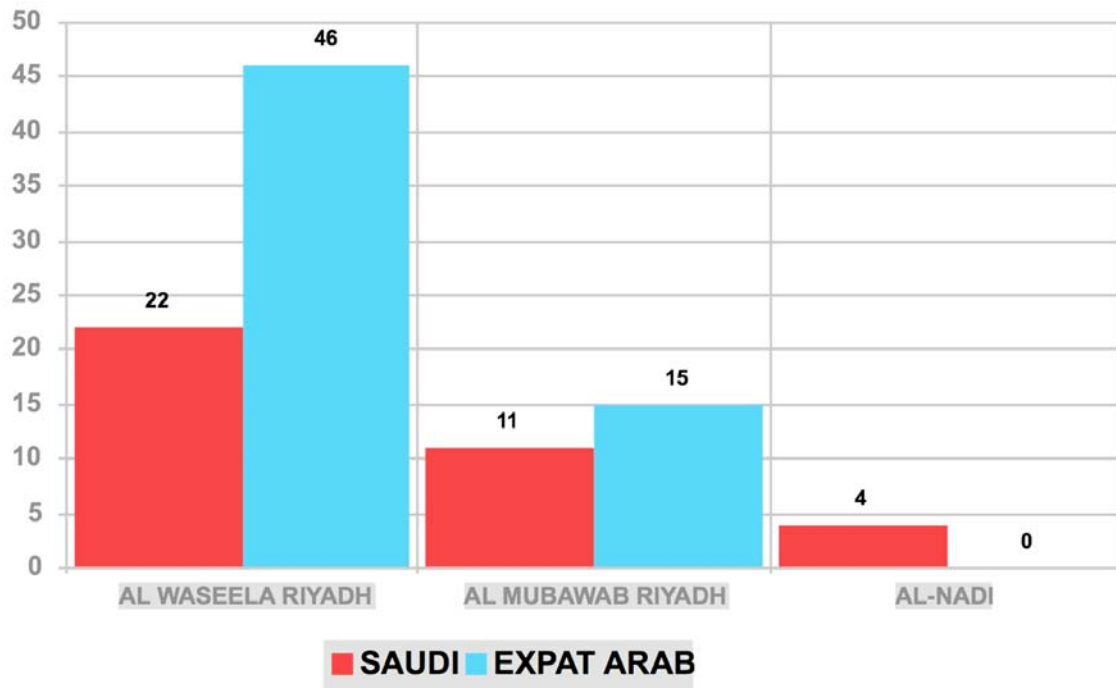
Weekly Magazine average readership – Central region (Source: Saudi NMA April 2007   TG: Saudi Males, Below 6000 income Age 20+)

Media Landscape (Outdoor) - Megacom:

Megacom

- Display Size

    3 X 4 Meters

- Format

    3 x 4 Meters Posters erected on mega stand light illuminated

    double side visible.

- Locations

    Located inside the city limits/major streets and outside the city

    (High ways) ensuring visibility

- Advantage

    Combination of size & frequency

- Regular campaign period

    2 Weeks & 1 Week

Media Landscape (Outdoor) – Unipole:

Static: Prisma:
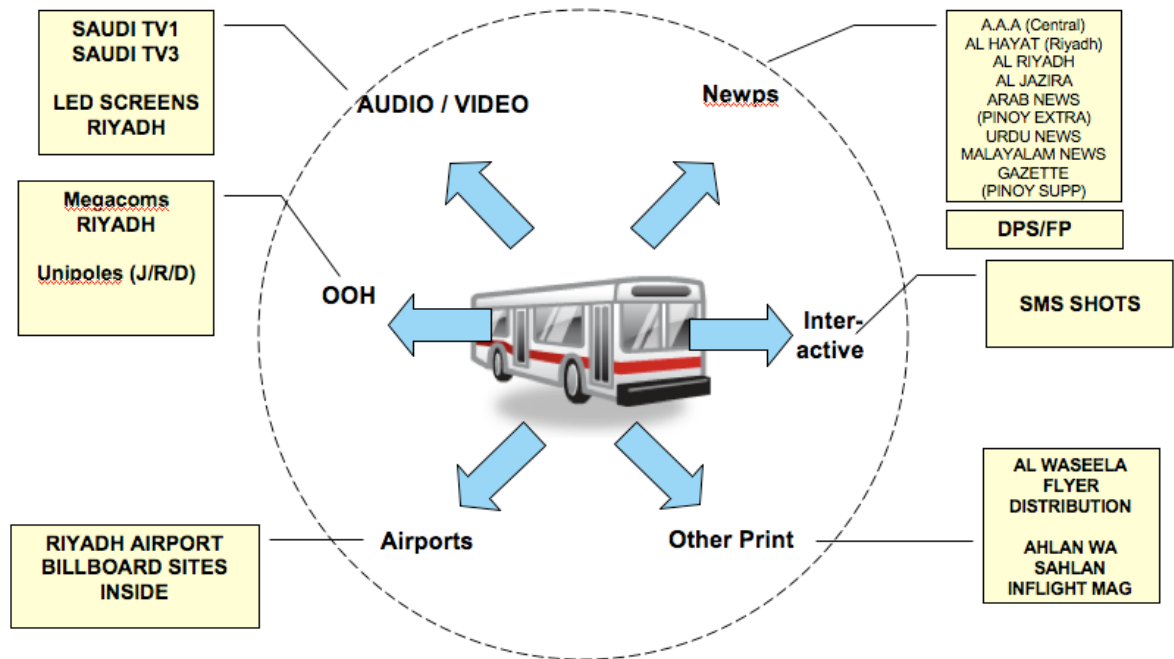

Unipoles

- Display Size

    14 X 48 Feet & 17 X 57 Feet

- Format

    Front Light, Back Light & Prisma

- Locations

    Located within the city limits/major high ways traffic intersection
    ensuring visibility and impact.

- Advantage

    Its high visibility ensures large audience coverage even through
    far distance as boards placed on the top of the height Poles or
    Roofs.

Bigger size provides better impact.

Media Landscape (Outdoor) – LED screens:

LED screen

- Display Size

    60 & 40 Sq./Mt.

- Format

    Video without audio

- Locations

    Placed at major selected heavily crowded junctions (Riyadh

    Olaya, Dabbab, Riyadh Sahara Mall, Al Akaria Mall, Al Badiaa

    etc.)

- Advantage

    Unique appeal compared to other vehicles

- Campaign

    1 Month, 3 Months, 6 Months & 12 Months.

Media overall – 360° degree communication:

SAUDI TV1 **SAUDI TV3** **LED SCREENS RIYADH**		**Newps**	A.A.A (Central) AL HAYAT (Riyadh) AL RIYADH AL JAZIRA ARAB NEWS (PINOY EXTRA) URDU NEWS MALAYALAM NEWS GAZETTE (PINOY SUPP)

AUDIO / VIDEO

Megacoms RIYADH

Unipoles (J/R/D)

OOH

Inter-active

DPS/FP

SMS SHOTS

RIYADH AIRPORT BILLBOARD SITES INSIDE

Airports

Other Print

AL WASEELA FLYER DISTRIBUTION

AHLAN WA SAHLAN INFLIGHT MAG

*All above subject to change, fine-tuning, confirmation & availability.

Media costs – overview:

- Above costs are estimates based on 2007 rates, highly subject to change during 2008

- All above subject to change, fine-tuning, confirmation & availability.

Campaign	Media / Medium	FRQ	Period	Budget SRM
LAUNCH	NEWSPAPERS	7 FP, 12 KP, 53 QP	6 Months	1,127
	MEGACOMS	380 Faces Central	2 Weeks	1,815
	INFLIGHT MAG	6 FP	6 Months	217
	SMS SHOTS	1 Million SMS	1 Month	126
	LED SCREENS	9 Screens/Month	3 Months	447
	TV (STV1 & STV3)	30 Sec x 75 Spots	1 Month	906
	AL WASEELA	150,000 Flyers x 3	3 Weeks	99
	AIRPORT SITES	TBC	1 Month	473
GRAND TOTAL SRM				5,210

Overview media costs

Timeline Media Plan:

Media plan/timeline

5.5   Long-term strategy

After launching the new service and the announcement and creating awareness for the new Public Transport Service in Riyadh it is very important to build up and manage the brand.

Marketing should be built on a firm long-term marketing strategy, which is to be placed at the forefront of the company, guiding all its development activities, marketing activities, communicational activities and actions.

While specific marketing tactics are needed as well, they should be based on the long-term strategy, integrating all key marketing areas: sales, advertising and promotion, public relations, customer relationship management and complete external and internal company communications.

With the help of the short-term measures, announcement and awareness campaign, and the long-term marketing strategy the Public Transport Service will develop:

- Brand awareness
- Brand image/profile
- Brand loyalty

The strategic direction of a long-term marketing strategy plays a big for the Arriyadh Bus Transit Design Project.
After the implementation of the first BRT lines more lines will follow and in the near future, the complete city will be covered by a new bus network.

The basis for an efficient long-term strategy is an accepted and comprehensive announcement and awareness campaign that builds the backbone for all following marketing activities.

After persuading Riyadh´s population to use the Public Transport it is necessary to keep them informed about new improvements, new bus lines, extended network, new buses, park & ride possibilities, etc. and to strengthen the customer loyalty to build up a strong and brand.