

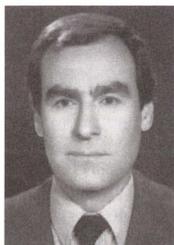
Outdoor media planning in Saudi Arabia: Availability and effectiveness

Although this paper did not form part of the programme for the Dubai Conference it deals with an important topic regarding advertising in this area. Outdoor advertising is a very effective marketing tool in Saudi Arabia, the most lucrative market in the Middle East. But, warns the author of this paper, before embarking upon a fully-fledged outdoor advertising campaign, do your homework thoroughly.

Secil Tuncalp

In most countries, when compared to other media – such as television, radio, newspapers, magazines, and direct mail – the outdoor media would be ranked at the bottom in terms of its share of advertising expenditures (Kotler 1988). Even though outdoor media would boast a number of distinct advantages including low cost, high repeat factor, and flexibility, this media would be primarily used to reinforce the advertising effectiveness of other media. In that supportive role, the outdoor media would contribute to the efforts channeled toward extending the life of the advertising investments.

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However, in Saudi Arabia the role of outdoor media may be significantly different. A number of considerations could elevate the outdoor media to the primary channel through which marketers can communicate directly with their target markets in the Kingdom. In this regard, it is difficult to put together a well balanced media mix in Saudi Arabia for two reasons: there is a paucity of media alternatives, and available media exhibit serious shortcomings.

The most developed media alternative in Saudi Arabia appears to be the print media. Several newspapers and magazines published both in Arabic and English languages give the international advertisers some choice of selection. However, the print media contain a number of inadequacies. For example, direct mail to consumers via their home addresses is not permitted at the present time. Furthermore, newspapers and magazines are severely constrained by their limited circulations, problems with distribution, and the expensive nature of their advertising space.

The least developed media alternative in Saudi Arabia is the audio-visual medium. This, however suffers from constraints brought on by the cultural climate in the country and governmental regulations (Tuncalp and Yavas 1987). For example, cinema, a major advertising medium in many developing countries (Shugaar 1983), does not exist in the country. Radio, another important advertising instrument in some developing coun-

tries (Levine 1982), is available in the Kingdom but the government will not allow advertising to be broadcast through this medium. Recently, the government also banned the use of video for advertising (Riyadh Bureau 1989). This leaves television as the only viable advertising audio-visual medium in Saudi Arabia. And as advertising on this medium was permitted only after 1986 (White 1986), television is still in its early stages of development as an advertising tool, and there is not enough information to judge its effectiveness (Tuncalp 1992).

It is against this background that the study reported in this article examined the outdoor media in Saudi Arabia. After taking an inventory of different outdoor media available in the Kingdom and arbitrarily classifying them into general media categories, the paper describes and analyzes each specific outdoor media within each general outdoor media category. The paper also investigates shortcomings of outdoor media and concludes with some observations that will help international advertisers in their outdoor media planning for the Saudi market, the most lucrative market in the Middle East (Tuncalp and Yavas 1986; Tuncalp, Yavas and Cavusgil 1987).

Outdoor media in Saudi Arabia

As can be seen in Frame 1, outdoor media for advertising in Saudi Arabia can be classified into four general media categories: billboards, electric signs, panels, and exhibitions. The billboard media category includes unipole, prisma, trivision, tipole, pisa, mupi, and roba. The electric signs category covers lamppost sign, rotasign, and spectacular. The panels category deals with a variety of media which are suitable for displaying advertising panels. Some of these media include pedestrian guardrails, gas pumps, bus shelters, sport stadiums,

**TABLE 1
OUTDOOR MEDIA IN SAUDI
ARABIA**

Medium Type

A. BILLBOARDS

1. Single-Support
Billboards

- a. Unipole
- b. Prisma
- c. Trivision
- d. Tipole

2. Multi-Support
Billboards

- a. Pisa
- b. Mupi
- c. Roba

B. ELECTRIC SIGNS

1. Lamppost Signs

2. Animated Signs

- a. Rotasign
- b. Spectacolor

C. PANELS

1. Stationary Panels

- a. Pedestrian Guardrail
Panels
- b. Gas Pump Panels
- c. Bus Shelter Panels
- d. Stadium Panels

2. Mobile Panels

- a. Baggage Trolley
Panels
- b. Bus Panels

D. EXHIBITIONS

airport luggage trolleys, and public buses.

Outdoor media are relied on to a greater extent in Saudi Arabia by many marketers wanting to communicate directly with their customers (Rahman 1984). Several years ago, a survey of the primary and secondary markets in Saudi Arabia was conducted by the Dancer Fitzgerald Sample Inc. of New York for Abdul Lateef Jameel, the sole distributor of Toyota automobiles in the Kingdom, to evaluate media opportunities in the country (Jameel 1982, 38). This market study concluded that with near-perfect climate, open visibility, dense automobile and pedestrian traffic, and congregation of population in a several large markets, Saudi Arabia was an ideal place for intensive use of outdoor media. The study also suggested that for the millions of expatriates from various countries who live and work in Saudi Arabia, outdoor media would be an effective way of passing the language barrier by its pronounced emphasis on visuals.

A past survey which was conducted by the Saudi Marketing and Research Consultants in conjunction with the Middle East Marketing Research Bureau, dealt with the outdoor media-use practices of companies in Jeddah (Jameel 1982, 39). The survey covered major advertisers with various product lines and Kingdom-wide operations. The study concluded that 'outdoor media constitute an important ingredient of the total advertising budgets of many companies' and that there was a high awareness among the companies about the advantages of this media.

In terms of total advertising expenditures in Saudi Arabia, expenditures on outdoor media come significantly behind the level of expenditures on print media and audio-visual media. Exact statistics are not available, but one source places outdoor media at four percent of total advertising ex-

penditures in Saudi Arabia (GIB 1990, 4). Another source estimates outdoor media to account for about ten percent of advertising expenditures in the Kingdom (Shehadi 1984, 41). Whatever its share may be, the outdoor media nevertheless has to be a part of the media-mix of any advertiser in the Kingdom of Saudi Arabia.

Billboards

Billboards are extensively used as an advertising medium in Saudi Arabia. The Saudi government allows advertising agencies to erect billboards along the national highways. Similar rights have been granted by the municipalities for placement of billboards at major inner-city roads and intersections, and along the roads leading to shopping malls, and commercial and business centers. As can be seen in Frame 1, there are a number of different kinds of billboards available in Saudi Arabia. These billboards differ from each other in terms of number of supports, size, number of faces, method of illumination, and suitable location.

Unipole is a 8 × 16 meters elevated billboard which would sit on top of a single massive steel pole. It would have two faces for displaying advertising and these two sides would be angled in such a manner that each side would face the oncoming traffic in both directions. In addition, both sides of a unipole would be illuminated by an automatic, light-sensory photocell system. When installed on hard shoulders of major highways and on prime high-traffic expressways, the extremely large size of this advertising medium enjoys good visibility from a distance. Some unipoles come with backlights. While having the same effect of a standard unipole during the day light hours, the backlit unipole increases visibility and impact during the nights.

The effectiveness of unipole as an

advertising medium was demonstrated when the Jameel Group, the sole Saudi distributor of Toyota cars in Saudi Arabia, used the pictures of Muhammad Ali, former world heavy-weight boxing champion, on its unipole campaign and was able to increase sales of Toyota cars in the Kingdom by 18.8 percent in one year (Jameel 1982, 39).

There are already hundreds of unipoles available to advertisers along the Kingdom's roads. Some of the locations for unipoles in the Western Province include the Jeddah-Makkah expressway which carries the heavy traffic of visitors to Makkah's holy places; the Jeddah bypass road; the Jeddah city old airport road; the Jeddah-Abfur-Madina highway; the Abha airport road; and the King Abdul Aziz airport access roads. Unipoles are available in the Central Province along the Riyadh airport access roads; the road system connecting Riyadh area to its suburbs; and the roads joining Al Qasim, Hail, Unayzah, and Buraydah regions. Unipoles are also located in the Eastern Province along the Al Khobar-Dammam-Dhahran tricity road system and the King Fahd Causeway to Bahrain.

Besides the standard unipole, this type of billboard comes in three other varieties. One kind of unipole is called *prisma* and it has the same face dimensions as a standard unipole. *Prisma* consists of a series of prisms spaced out such that the three faces of prisms form a continuous surface when they are lined up. In this manner, *prisma* can accommodate three separate displays on the same unipole. By programming the prisms to rotate one face every few seconds, the *prisma* can display three alternating but separate ads or it can display three parts of a moving message.

A second type of unipole is called *trivision*. This billboard is a smaller version of *prisma*. It would have a

surface area consisting of 4×14 meters in dimension. *Trivision* would be elevated from the ground by 9 meters sitting on a solid unipole. The operating characteristics of a *trivision* is identical to *prisma*. Because of its recent market entry, *trivision* is available only in the Jeddah area at the present time.

The third kind of unipole is called a *tipole*. This kind of billboard is a scaled down version of a unipole which would have an advertising surface area of only 120×180 centimeters. *Tipole* is suitable for inner-city roads and it is designed to achieve maximum visibility on congested junctions and roads with its higher elevation. *Tipoles* are available in a number of cities in the Kingdom including Jeddah, Makkah, Madina, Dammam, Al Khobar, Qasim, Abha, Khamis Mushayt, and Hail.

There are also several other varieties of elevated billboards, much smaller than unipoles, which are supported on several legs. One such billboard is called *pisa*. *Pisa* is a 2×4 meters medium size elevated billboard which is usually positioned along roads entering major cities or at prime road intersections. Because of their shorter visibility ranges, these billboards will display advertising only on the faces pointing toward the incoming traffic.

Another type of multi-support billboard is *mupi*. This billboard has a rectangular shape which is much smaller than *pisa*. *Mupi* has a standard size of 1.5×3 meters. This type of billboard is located primarily on the pedestrian side of city streets and near the traffic lights. Even though it is not a common practice, it is possible to display advertising on both faces of a *mupi*.

Finally, *roba* is the smallest size billboard available in Saudi Arabia. It comes in a standard size of 1×2 meters. This billboard is ideally suited along the high pedestrian traffic areas

and at locations where pedestrians would congregate such as bus-stops.

Cost of billboards

The advertising rates for single-support billboards are influenced not only by their type but also by which side of the road they are positioned. Unipoles located on the right hand side of roads command higher rates than the ones situated on the left hand side. For a twelve-month period, the cost of placing advertising on one face of a standard unipole and *prisma* will vary between 40,000 to 125,000 riyals (3.76 riyals = 1 dollar) depending on its location, lighting, and road position. The cost of advertising using *trivision* would be around 72,000 riyals per face per year. Depending on the city location, the advertising rate for a *tipole* for a twelve-month period would be between 28,000 riyals to 40,000 riyals per face.

The advertising rates for multi-support billboards will also depend on their locations. For example, annual advertising rates for *pisa* will be around 27,000 riyals along the Makkah-Madina road and the same rate will be around 39,000 riyals along the Jeddah-Riyadh road. *Pisa* can also be rented on weekly schedules.

The advertising cost for a *mupi* for a circuit consisting of 40 locations running for two weeks can vary from 36,000 riyals in Madina to 55,000 riyals in Jeddah. *Mupi*'s rates can go as high as 297,000 riyals for a circuit in Riyadh consisting of 40 separate display locations over a twelve-month period.

Finally, *roba* can be rented on weekly schedules consisting of 2-, 4-, 12-, 24-week periods. For a circuit of 60 separate locations, advertising on *roba* would cost the advertisers from 24,000 riyals in Makkah to 29,000 riyals in Dammam for a 2-week showing. The same circuit would amount

to around 262,000 riyals for a 24-week period.

Electric signs

Signs that are illuminated from within are also used extensively for advertising in Saudi Arabia. The abundant supply of electricity in the Kingdom at subsidized prices is an important contributing factor for the tremendous growth in the use of electric signs as an advertising medium. As can be gleaned from Frame 1, there are three types of electric signs that are important for advertisers in Saudi Arabia. These are lamppost signs, rotasigns, and spectacolor.

Illuminated lamppost signs are available for advertising purposes in Saudi Arabia. The standard signs come with two faces, each face having a printed area of 70×110 centimeters. These signs are located on principal inner-city traffic routes in most major cities of the Kingdom. Because of the high traffic density, the King Fahd Causeway connecting Saudi Arabia to Bahrain is another location where illuminated double-faced lamppost signs are available for placing advertising. Two types of lamppost signs are currently in use along this causeway. The causeway standard illuminated sign comes in 165×176 centimeters size, and the causeway circular lamppost sign comes in 120 centimeters of diameter.

One type of electrical moving sign available in Saudi Arabia as an advertising medium is the rotasign (Hassan 1981). This medium consists of an attractive metal case which contains a film spool at the top and bottom. As the spools move automatically, they bring into view frames of film which are illuminated in brilliant colors. Each picture frame can be exposed and held in place for a time period determined by the advertiser.

Rotasign comes in three sizes. The largest one measures 84×120 centi-

meters, the medium size is 50×63 centimeters, and the smaller unit measures 21×27 centimeters. Because of its compact size and the ease with which it can be installed, this kind of moving display system is ideal for public places where pedestrians congregate: such as shopping centers, hotels, banks, and airports.

Another type of moving electrical sign is the spectacolor. Spectacolor appeared in Saudi Arabia during 1981 (Khusro 1981). This fully computerized multicolor display system is also known in the Kingdom as the Unitedcolor. Similar to the unit operating at Times Square in New York, this medium has a giant 8×15 meters electronic screen mounted on a 8 meters high platform. The fully computerized screen can display animated advertisements and illustrations in any combination of 36 colors. After it is programmed, the computer, which has a backup system as a standby in case of a breakdown in the primary unit, will run continuously for fourteen hours from sunset until sun up. Already, two spectacolor displays are in place and operating in Jeddah and Riyadh.

Cost of electric signs

The current advertising rate for an illuminated lamppost sign with two faces is around 2,500 riyals for twelve-months from the initial date of display. The Causeway standard illuminated sign will cost around 15,000 riyals for a twelve-month period. This rate applies for up to five signs, and the quantity discount will bring the rate per sign down to 12,500 riyals for over eleven signs. The Causeway circular illuminated sign will cost around 4,000 riyals for twelve-month booking period. The quantity discount available to advertisers will bring the rate per sign down to 2,800 riyals when over twenty-one signs are rented.

Advertising spots on spectacolor can be leased on a monthly basis. Advertisers can rent 15-, 30-, 45-, 60-second spots or any combination of these standard duration spots. The advertising rate for a three minute spot on spectacolor is 21,500 riyals for thirty days from the initial appearance of the ad on the spectacolor. A similar advertising spot for two minutes will cost 14,500 riyals and a one minute spot rate is 7,400 riyals per month.

However, because of the operating nature of spectacolor, the advertisers will be getting more than the one minute of actual exposure time if they lease a one minute spot. The spectacolor is programmed to run continuously for fourteen hours, from sun down to sun up, during each 24-hour period. The fourteen-hour daily operating schedule for spectacolor is broken down into 60 minute programmable cycles. Therefore, spectacolor will operate on the basis of fourteen 60 minute cycles for each 24-hour period.

An advertiser leasing a one minute spot on spectacolor for 7,400 riyals will actually receive 14 minutes of actual display time corresponding to one minute display time for each of the fourteen daily cycles. For a one minute spot, the advertiser will receive 420 minutes of actual display time for a month. If the advertiser places a 15 second ad and leases a one minute spot on spectacolor, then this ad will be displayed four times for every 60 minute cycle, for fourteen cycles per 24-hour day, over a 30 day monthly period. In this case, the advertiser will receive 56 actual displays of the 15 second advertisement per day for a total of 1,680 displays over a month.

Panels

Another type of outdoor media available in Saudi Arabia for advertising

purposes are the panels. This advertising medium come in all different sizes and shapes. Panels can be distinguished on the basis of the type of attachments they are posted on. Panels can be attached on surfaces that are stationary such as guardrails, petrol pumps, bus shelters, and stadium walls and fences. Panels can also be attached on surfaces that are mobile such as airport baggage trolleys and buses.

Advertising panels are available in many cities of Saudi Arabia as mounted on pedestrian guardrails. These rails would demarcate the border between roads or between pedestrian sidewalks and city streets. In both cases, the guardrails would prevent jaywalkers from crossing roads at dangerous and accident-prone locations that have high-speed car traffic and at main traffic intersections. Hundreds of advertisements, printed on aluminum panels, can be seen attached on guardrails along many city streets in Jeddah, Dammam, and Riyadh.

Panels containing advertisements can be also attached on gas pumps. The motorists who visit petrol stations are captivated by this advertising medium. The company that has the Kingdom-wide franchise for petrol pump advertising has already sponsored panels to appear on pumps of a substantial number of gas stations in Jeddah. This company is in the process of expanding its market coverage with this outdoor advertising medium to gas stations located in Riyadh, Dhahran, Taif, and Abha.

Stationary advertising panels can be attached to the walls of bus shelters that are located along the bus routes of the Saudi Public Transportation Company. Numbering in the thousands, these bus shelters can accommodate up to four standard size advertising panels: two panels fixed side by side along the outside surface of the back-wall, and two panels

posted side by side along the inside face of the back-wall. As the side-walls of the bus shelters are either left open or are covered by glass panels, there would be no advertising appearing on these walls. The standard size for bus shelters is about 150 × 150 centimeters. Panels displayed around the sport fields in stadiums are another popular medium in Saudi Arabia for advertising. These panels are not only seen by spectators who come to stadiums to attend sport activities and other national or international celebrations, but these panels are also seen by much larger audiences when the events held in stadiums are broadcast on Saudi television. Stadium panels are especially useful in Saudi Arabia to reach specific types of local, regional, and national target markets such as teenagers of both gender and adult males who tend to be soccer fans.

Twelve GPYM sport cities

The General Presidency for Youth Welfare (GPYM) constructs and operates stadiums in Saudi Arabia. At present, there are twelve GPYM sport cities located in Makkah, Madina, Taif, Qasim, Abha, Al Hassa, Hail, Al Khobar, Tabuk, Jizan, Al Baha, and Majmaah. Each of these sport cities contain a sport stadium which can accommodate 10,000 to 35,000 spectators. In addition, there are four GPYM sport centers located in Riyadh, Jeddah, Uneizah, and Al Khobar. The main hub of each one of these sport centers is a stadium which can accommodate anywhere from 30,000 to 45,000 spectators. Finally, GPYM also operates a giant sport stadium in Riyadh, the King Fahd International Stadium, which can hold about 70,000 spectators.

The main sport activity in Saudi Arabia is soccer. Most adult males and teenagers are avid soccer fans. The soccer federation administers a

league consisting of three divisions where each division is made up of twelve soccer teams. The soccer season runs from October through March. During this period, several 90-minute matches are played in the evenings on thursdays and fridays, which correspond to weekend days in Saudi Arabia. After the champion teams are determined for the three leagues, a special tournament, which is called the King's Cup, is held during April to determine the overall national champion. The soccer games for the King's Cup are played only at the King Fahd International Stadium at Riyadh.

Every week, the important games, those games which have regional or national interest among soccer fans, are broadcast live on Saudi television. For example, during 1988/89 soccer season, the Saudi television broadcast 160 hours of soccer. In 1989/90 this was increased to 180 hours. During 1990/91 season, the Saudi television showed about 190 hours of soccer matches which were screened at peak viewing times during the evenings or afternoons. One advertising agency estimates that, during transmission of soccer games on television, football audience rating could be as high as 75 percent of the total television viewership. This would correspond to an average viewing figure of 3.1 million persons per game. The agency also estimates the soccer audience to consist of males between 12 to 38 years of age and females between 18 to 26 years of age.

High-quality spectators

At present, advertisers can rent panels in only eight soccer stadiums in the Kingdom. These stadiums, their approximate seating capacities given between parenthesis, and their locations are as follows: the King Fahd International Stadium (70,000) in Riyadh; Al Malaz Stadium (40,000) in Ri-

yadh; Youth Welfare Stadium (35,000) in Jeddah; Prince Saud Bin Jalawi Stadium (25,000) in Al Khobar; King Abdul Aziz Islamic Sports City Stadium (35,000) in Makkah; King Fahd Sports City Stadium (25,000) in Al Taif; Prince Abdul Aziz Bin Musaid Sports City Stadium (35,000) in Hail; and Prince Abdullah Bin Abdul Aziz Sports City Stadium (35,000) in Al Qasim.

Although all of these eight stadiums have facilities for television broadcasting, the frequency of use and higher attendance tendency in three stadiums make these stadiums especially important for potential advertisers. These stadiums are the Al Malaz Stadium in Riyadh, the Youth Welfare Stadium in Jeddah, and the Prince Saud Bin Jalawi Stadium in Al Khobar. Finally, the importance of the King Fahd International Stadium should be highlighted. In spite of the fact that fewer events are scheduled at this stadium, the quality of the spectators, who attend the celebration of the Saudi National Day or the soccer matches during the King's Cup, is extremely high. For these events, this stadium will host the top government employees, members of the diplomatic community residing in Riyadh, and the members of the royal family, in addition to the huge crowds.

There are three types of stadium panels that can be rented for displaying advertising. The free-standing side panels are placed to the rear left and right hand sides of the goals, with the panel faces turned inwards facing the direction of the television cameras. The free-standing special panels are placed side by side along the length of the soccer field with the panels facing the television cameras. The stationary panels are mounted on the crowd barrier or fences facing inwards toward the playing pitch. All of these three types of panels would be situated in such a manner that they would all get maximum visibility, es-

pecially with respect to the television coverage.

Cost of stationary panels

The cost of advertising panels attached to pedestrian guardrails, gas pumps, and bus shelters depend on their location and quantity. At the present time, advertisers can display their advertisements on guardrails, gas pumps, and bus shelters by paying anywhere from 2,000 riyals to 4,500 riyals per panel for a one-year period. The companies that rent advertising space on guardrails, gas pumps, and bus shelters will undertake the maintenance of their panels and will also repair the ones that are damaged by road accidents.

The cost of stadium panels depends on their type and their placement location with respect to the television coverage. In the past, the usual practice was to rent panel space, basing the rental cost on the per square meter of panel area. However, the company, which received the Kingdom-wide exclusive contract for stadium panels this year, decided to standardize the sizes of the three types of panels available for stadium advertising. The free-standing side panels, the free-standing special panels, and the stationary crowd barrier or fence panels all come in standard size of 5 meters long by one meter in height. The annual cost for a free-standing panel is around 125,000 riyals and the similar cost for a stationary panel is around 90,000 riyals. These costs would include charges associated with design, production, affixing, and maintenance of the panels. However, it is also possible to receive substantial discounts by bargaining with the company marketing this advertising medium.

Mobile panels

Baggage trolleys that are available to

passengers at the Kingdom's airports are used for mounting panels containing advertisements. Each trolley can accommodate up to three panels: two back to back panels 40×50 centimeters in size and one panel which is 16×51 centimeters in size. This medium is especially useful in reaching specific types of targeted buyers including expatriate businessmen visiting the country, Saudi Arabian tourists traveling abroad, and expatriate guest workers arriving in the Kingdom or going away for their annual vacations.

Advertising panels can also be mounted on the thousands of buses operated by the Saudi Public Transportation Company (SAPTCO). This form of transit advertising is effective because the advertising messages carried by the bus panels reach not only the bus passengers, but also the pedestrians and the passengers in other vehicles along the routes followed by these buses. In addition, the movement of the buses also serve to draw people's attentions to the advertising panels carried on their two sides; one side facing the pedestrian traffic and the other side facing the oncoming traffic. As bus routes are fixed, the messages carried by the bus panels are repeated day after day thus reinforcing message awareness.

The double-decker buses of SAPTCO will carry several panels depending on the sizes of the panels used. The panels that can be mounted on double-decker buses come in various sizes from 48×200 centimeters for the smallest panel to 70×500 centimeters for the largest size panel. For example, the double-decker buses can accommodate up to eight large size panels; four panels mounted on each side; two panels placed on the upper-deck and two panels on the lower deck.

The panels that can be attached to the single-decker buses also come in a variety of sizes. The smallest panel

will be 45×110 centimeters and the largest panel can be around 70×400 centimeters in size. The single-decker buses will accommodate up to four panels of the largest size: two panels side by side along each longitudinal face of the bus.

Cost of mobile panels

Because the advertising rates for mobile panels depend on too many factors including size of the panel; duration of display; number of panels; and location and routes, it is difficult to come up with standard cost information. However, in order to give the potential advertisers a feel for the kind of costs involved, it would be appropriate to cite some examples. The advertising rate for each trolley containing three panels is around 2,500 riyals for the twelve-month period commencing with the initial display of the advertising copy containing a pictorial or a message. Quantity discounts would be available to advertisers renting multiple numbers of baggage trolleys for fixed periods of time. Similar advertising rates for bus panels would be around 2,000 riyals to 13,000 riyals per panel for one year. More specifically, it would cost 9,600 riyals per year to place one large size panel on a single-decker bus.

Exhibitions and costs involved

Another outdoor advertising medium available in Saudi Arabia is exhibitions. This medium gained eminence in the country especially during the last several years (Ibrahim 1988). At present, every major city in the Kingdom possesses several large and modern exhibition centers. Some of these centers are non-profit centers managed either by the private sector through the Chamber of Commerce and Industry or by the government through the Ministry of Commerce

and by the Ministry of Industry and Electricity. Also, in this realm are the exhibitions organized by the Kingdom's universities for their students and staff. For example, the annual computer exhibition organized by the King Fahd University of Petroleum and Minerals at Dhahran draws large crowds who are interested in personal computers, business computers, word processors, and other peripheral devices.

Other exhibition centers are owned and operated by commercial establishments in the private sector. For example, the Saudi Expo Center located in the Baroom Complex in Jeddah is operated by the Saudi Corporation for International Exhibitions and Fairs. Jeddah boasts another exhibition center which is called the Jeddah Expo Center. This exhibition center is managed by the Al Harithy Company for Exhibitions Limited. The single exhibition center in Riyadh is called the Riyadh Exhibition Centre and this center is operated by the Riyadh Exhibitions Company Limited. In addition, most of the five-star hotels in the Kingdom have exhibition halls and centers. For example, the Al Gosaibi Hotel in Al Khobar is very active in organizing exhibitions using its facilities.

Exhibitions provide a useful advertising medium for developing business contacts and especially for introducing new products to the region. Because they provide an atmosphere similar to the traditional bazaars, the exhibitions are readily accepted by the Saudi market. However, in addition to advertising them, the exhibitors should be prepared to sell their products to the public attending these shows. One reason exhibitions get good attendance is that people come to these shows expecting to purchase the advertised items at discounted prices. Therefore, it is important for exporters participating in exhibitions

to bring along ample supplies to prevent stock outs.

It is impossible to generalize the advertising costs associated with participating in exhibitions. These costs will be determined by the exhibition timing, location, nature, length, audience, space size, and display-help among other factors. It is imperative for the advertising managers of multinational companies to monitor the exhibition activities in the Kingdom's exhibition centers throughout the year and get the appropriate cost information directly from the organizing companies or committees.

Problems with outdoor media

Several climatic conditions pose serious problems to the effectiveness of outdoor media in Saudi Arabia. For example, during certain seasons of the year, Saudi Arabia would be under the influence of high winds. These strong winds, also called shamals, carry sand particles. After these winds die down, the sand particles that found their way up to the atmosphere would come down as sand rain. Either of these conditions, as sand storms or as sand rains, drastically reduce visibility and block out outdoor advertising media. During these seasons, the sand storms and rains can render outdoor media ineffective for weeks at a time.

The harsh desert climate prevailing in most of Saudi Arabia can be very destructive for the outdoor media. The sand storms will not only knock down weakly-supported billboards, electric signs, and panels but the abrasive sand particles carried by these storms will also scratch and scrape out the pictorials and illustrations painted on the billboards and panels. In addition, the huge heat differential between the day-time temperatures, which can climb as high as 140 degrees Fahrenheit, and the cool desert nights cause drying out and eventual

cracking and peeling of pictures painted or pasted on billboards and panels.

It is a fact that the harsh climatic environment in Saudi Arabia has a significant wear and tear action on the outdoor media thus requiring their continuous maintenance. Unfortunately, the agencies and companies that are responsible for repairing and upkeeping outdoor media are not very effective with this service. A casual survey by this observer of the outdoor media in and around the trities of Dammam, Al Khobar, and Thugbah has yielded a number of dilapidated billboards, broken down and collapsed panels, and many dark lamppost signs which did not illuminate.

In the recent past, the tremendous pace of urban development was another factor which hurt the outdoor media. For example, billboards and panels erected along roads and intersections, and illuminated signs installed on lampposts had no assurance of being at their original spots in the coming weeks or even days. The ongoing construction activity required that anything that got in the way of road expansion and street paving was to be bulldozed down. This would mean that lampposts carrying signs would have to come down if streets needed to be widened, and billboards and panels had to be uprooted if highways required additional lanes. However, it should be pointed out that with the completion of the physical infrastructure construction and the slowing down of urban development, this problem is not anymore as common an occurrence as it was in the past.

Perhaps the foremost problem with outdoor media in Saudi Arabia is the fragmentation of the advertising industry along the outdoor media lines. It is very difficult to know which advertising agency has the exclusive contract to sell advertising space on

a certain type of outdoor media. To make things worse, as the agencies having exclusive rights over certain media seem to be continuously changing, there are no uniform or standard industry practices with respect to outdoor media's size, cost, quality, and maintenance aspects.

Finally, one word of caution needs to be raised about the capabilities of some of the companies active in the outdoor media industry in Saudi Arabia. As the right to exclusively present certain types of outdoor media are acquired through a competitive bidding procedure, the final winner of a contract to exclusively market advertising space for a specific outdoor media (i.e. stadium panels) may not even be an advertising agency, but it could be a construction company or a maintenance firm.

Conclusions

Even though a number of outdoor media exist in Saudi Arabia and these media are used extensively by international marketers of certain types of products (i.e. automobiles, personal computers, electronic audio-visual equipment, etc.), the planning of outdoor media nevertheless can be a complex decision for the international advertisers. Before embarking upon a fully-fledged outdoor media advertising campaign in Saudi Arabia, it is best to do some homework by studying other advertisers; by interviewing some advertising agencies; and by exercising caution with a considerably slowed-down action program.

A good starting point for a first-time user of outdoor media in Saudi Arabia is to gather information from the past and present users of outdoor media in the Kingdom and to take direction from the activities and experiences of these users. One means of collecting this information would be through observation. The company's

salesmen can be instructed to keep their eyes open for outdoor advertising along their routes and to report descriptions of these ads to their supervisors. Another means of gathering this type of information would be through direct contact with the marketing managers of the companies identified as frequent users of outdoor media in Saudi Arabia.

In light of the information received from previous users of outdoor media in Saudi Arabia, the first-time users should interview several advertising agencies before finalizing their agency decisions. In this regard, the international marketers should also consult with the commercial centers of their embassies located in Saudi Arabia to take advantage of their suggestions and recommendations. It should be remembered that even though around 300 companies are registered and licensed by the Saudi government as advertising agencies, only two dozen seem to be active in this field at any one time, and fewer would profess to having any expertise in outdoor media.

The investigation of agencies should not only focus on their present capabilities as reflected by their current activities, but it should also examine their client/agency relationships by consulting with their previous clients. It would be also prudent to find out ownership information for the agencies. It should be remembered that those agencies that show members of the royal family in their boards or as parts of their management would exhibit more clout and staying power in the business.

Once a decision has been made for an advertising agency, then that decision should be looked upon as a long-term relationship. It is best to stick with the same agency in Saudi Arabia as long as the client companies are happy with the services provided by their advertising agencies. It is advisable in Saudi Arabia not to play one

agency against the others in order to get a better deal or a better performance. Many times, agencies will opt to protect their inter-relations within the industry instead of siding with client companies.

It is also best to proceed with the use of outdoor media in a controlled mode where, after taking each action, the international marketers would pause to give themselves a chance to assess the results of their advertising tactics. As it is doubtful that any one outdoor media will produce better product position in terms of market awareness or sales, it would be prudent to scramble the use of various outdoor medium available in Saudi Arabia as the implementation of the outdoor media campaign progresses in small steps.

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Summary

Inavailability of cinema, radio and video as advertising media, and the recency of television advertising and its limited and highly constrained availability to international advertisers, places premium value on outdoor advertising in Saudi Arabia. This paper reports the findings of a study which investigated various outdoor advertising media, their current costs, and the effectiveness of these media for shaping market positions of international products in the Saudi market. After presenting some constraints to the effectiveness of outdoor media, the paper concludes by suggesting some implications for the advertising strategies of international marketers operating in Saudi Arabia.

Résumé

L'absence de cinéma, de radio et de vidéo comme support publicitaire, et le caractère récent de la publicité télévisée et son accès limité et très réglementé aux annonceurs internationaux, donnent à la publicité extérieure une grande valeur en Arabie Saoudite. L'auteur présente les résultats d'une étude sur divers supports de publicité extérieure, sur leurs prix actuels et sur l'efficacité de ces support pour donner forme au positionnement de produits internationaux sur le marché saoudien. Après

avoir énuméré certains facteurs qui entravent l'efficacité des supports de publicité extérieure, l'auteur conclut en indiquant les implications que cela peut avoir pour les stratégies publicitaires des hommes de marketing étrangers opérant en Arabie Saoudite.

Zusammenfassung

Die Nichtverfügbarkeit von Kino, Hörfunk und Video als Werbemedien und die noch sehr neue Verfügbarkeit der Fernsehwerbung sowie ihre begrenzte und stark eingeschränkte Zugänglichkeit für internationale Werbetreibende macht die Außenwerbung besonders wertvoll. In diesem Referat wird über die Ergebnisse einer Studie berichtet, in der verschiedene Außenwerbungsmedien, ihre derzeitigen Kosten und die Wirksamkeit dieser Medien für die Gestaltung von Marktpositionen internationaler Erzeugnisse im saudischen Markt untersucht wurden. Eine Reihe von Beschränkungen der Wirksamkeit der Außenwerbungsmedien wird dargestellt. Der Aufsatz schließt mit dem Hinweis auf einige Implikationen für die Werbestrategien im internationalen Marketing von in Saudi Arabien tätigen Unternehmen.