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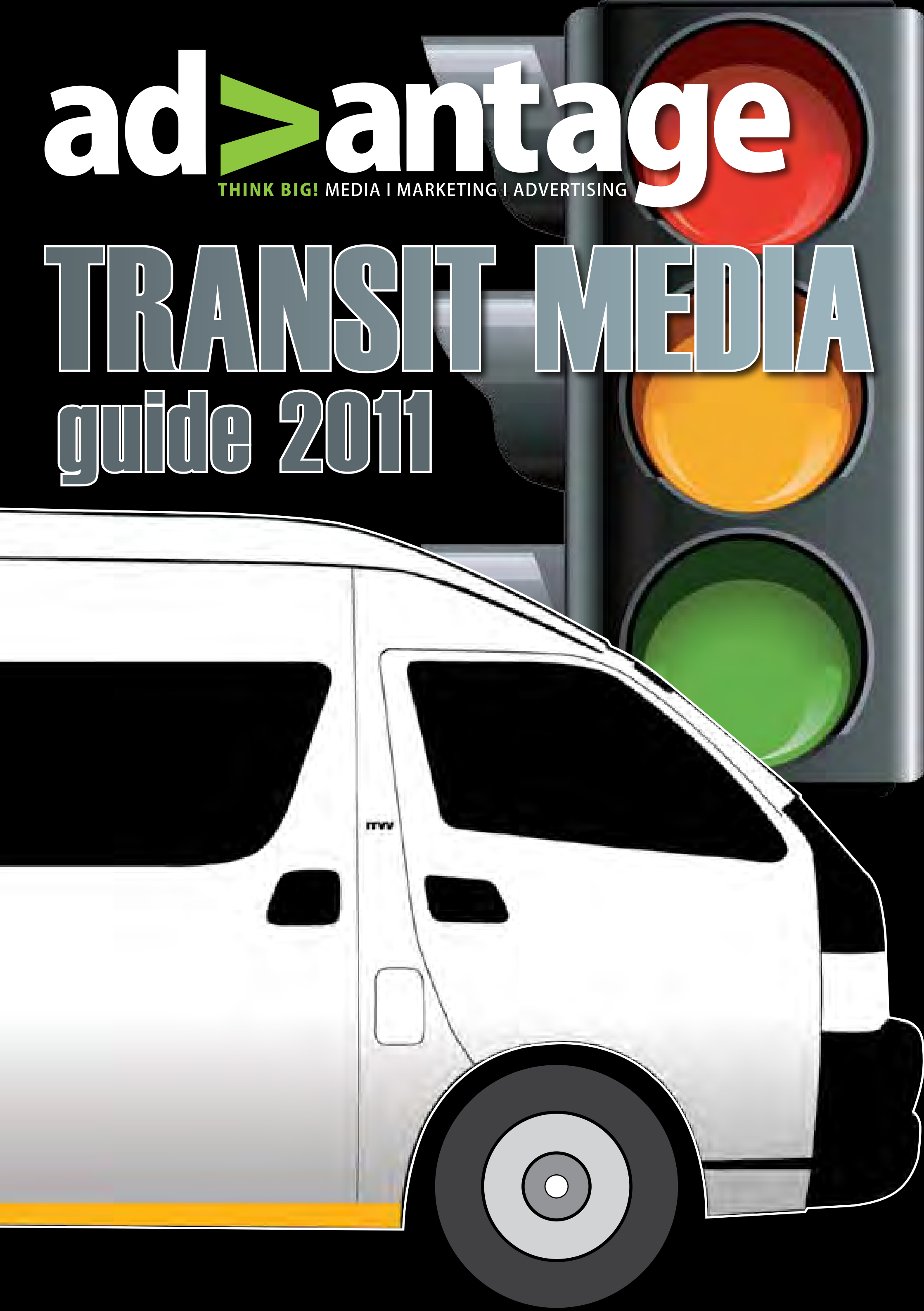

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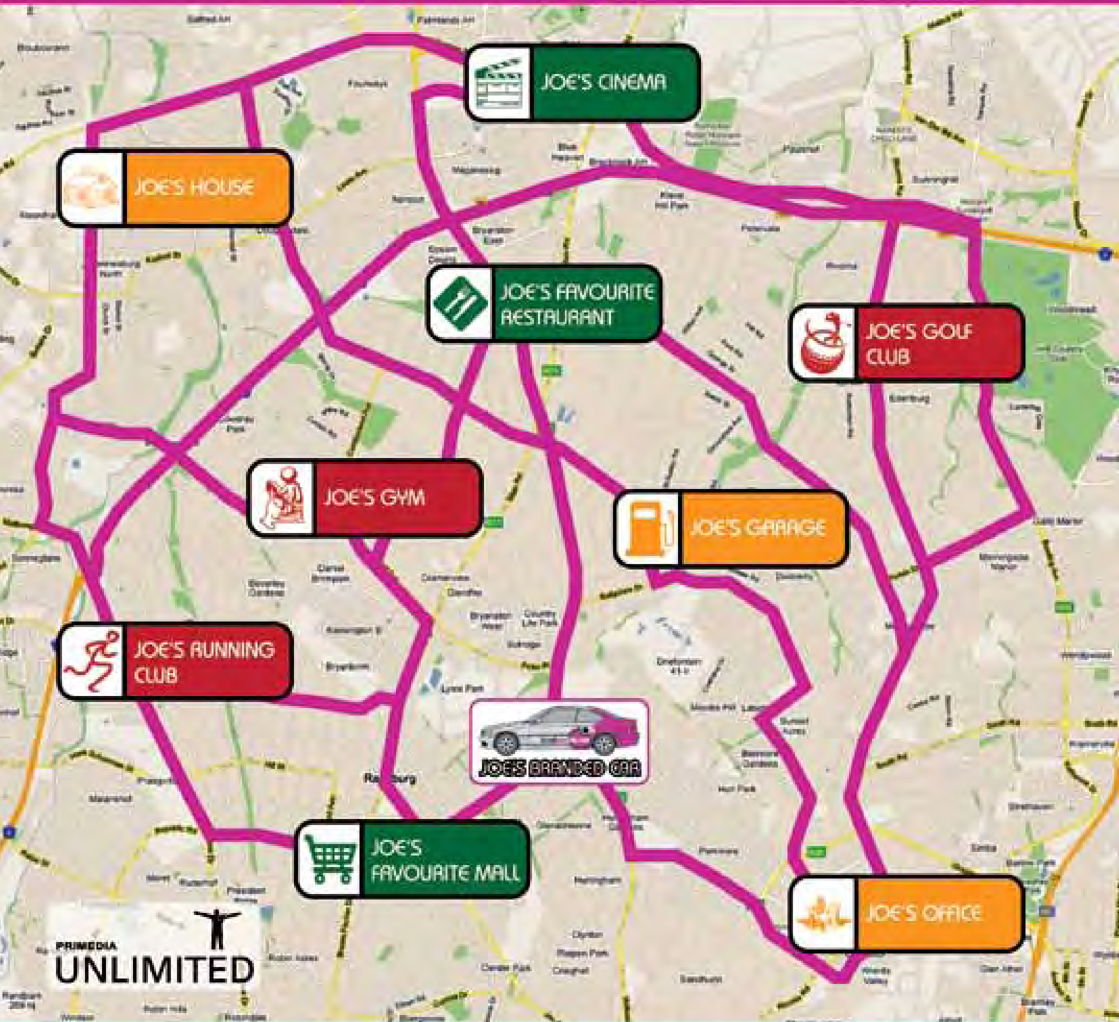

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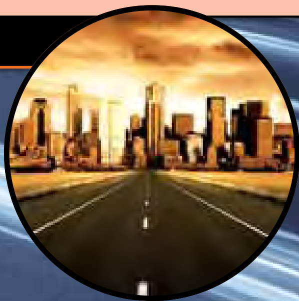

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The road less travelled

THE *ADVANTAGE* TRANSIT GUIDE provides you with a glimpse into the transit landscape in this country. This is a landscape that has been changing rapidly over the past three years. The World Cup served as an impetus, but the developments around this event last year, were only the tip of the iceberg. Since this event, South Africans have been able to enjoy the benefits of new bus services, the Gautrain (phase 1) and new and improved highways. While not all cities have been able to live up to their promises of new and/or improved public transport, most of the country has seen the improvements.

What is interesting is the South African mindset regarding public transport. Too many South Africans see public transport as the domain of the poor. Instead, all South Africans should be embracing the fact that efficient public transport is being put into place across the country. And Government is not asking every person who owns a car to give up their vehicle. For example, on the Pretoria to Johannesburg route, it is asking for a 20% reduction in cars on the road. The Gautrain will come into operation on this route in June and I hope that many South Africans make use of this opportunity. Who would not want to travel to work, reading the paper or catching up on email instead of sitting in your car in a traffic jam?

What needs to change is the South African mindset. Various organisations in public transport and Government need to push this by marketing these services and their benefits. They need to dispel the negative remarks about public transport made by many of the population through a marketing campaign. And this is a sector rich in media services. This sector is a buoyant and growing one, with many opportunities for brands.


Danette Breitenbach, Transit Guide editor

HOW THE GUIDE WORKS

The media owners in this sector are also proactive in commissioning research, which has led to a wealth of information on this sector. The Guide uses two sources of information of which the research by media houses is one. The other is information based on research from various organisations such as the Department of Transport (DoT), Department of Statistics (Stats SA) and the Council of Scientific and Industrial Research (CSIR) and much of this research was conducted in the early 2000s. The First South African National Household Travel Survey 2003 (NHTS 2003) is an example of this. This provides the necessary background to the 'how and why' of the changes we are seeing in this landscape have come about. The information in the Guide needs to be viewed in this context. ●

A revolution in transport

In the introduction to the White Paper on National Transport Policy it is stated that transport plays a significant role in the social and economic development of any country. The South African Government has therefore recognised that transport as one of its five main priority areas for socio-economic development.

SINCE 1996 THE URBAN DYNAMICS of the country changed. The country's population increased from 40.6 million in 1996 to 44.8 million people in 2001 according to Stats SA‡. The number of people employed rose from nine to 11 million. This has led to growth in metropolitan areas and significant changes to the main mode of travel in these areas and to a lesser extend in urban and rural areas. The obvious is the creation of an increased demand for daily travel between home and urban activities because of ongoing urbanisation. The province experiencing the most pressure in this regard is Gauteng, which experienced a population growth of 20% between 1996 and 2003.‡

There are **10 million** commuters in SA*

76% of households do not have access to train services*

38% of households do not have access to bus services*

9% of households have no available taxi service*

Commuters in **metropolitan areas – 4.8 million***

Commuters in **Urban areas – 3 million***

Commuters in **Rural settlements – 2.2 million***

"The vision for South African transport is of a system which will provide safe, reliable, effective, efficient and fully integrated transport operations and infrastructure which will best meet the needs of freight and passenger customers at improving levels of service and cost in a fashion which supports government strategies for economic and social development whilst being environmentally and economically sustainable."

White Paper on National Transport Policy: Department of Transport, Pretoria, 20 August 1996

TOTAL PASSENGER TRANSPORT ESTIMATES JAN 2008 – FEB 2009		
Year	**Month**	**Number of passengers ('000)**
2008	January	75 600
	February	90 145
	March	85 136
	April	78 842
	May	83 435
	June	76 962
	July	83 817
	August	84 769
	September	88 791
	October	94 422
	November	85 144
	December	62 727
	Total	989 790
2009	January	77 705
	February	84 398

Source: Statistics South Africa (StatsSA)

However, it was only 10 years after the last major analysis and transport policy in the mid-80s that Government formulated the White Paper on National Transport Policy✣. The country had obviously gone through profound and far reaching changes since the mid-80s and its transport systems had also declined due to a lack of investment and infrastructure not being adequately maintained. This, together with a growth in the country's population and urbanisation has meant increased demand for good efficient transport systems. It also meant that the South African transportation system was inadequate to meet the basic accessibility needs in many developing rural and urban areas.✣

DoT'S AIMS

It is the Department of Transport's (DoT) aim to lead the provision of an integrated, sustainable, reliable and safe transport system, by planning, developing, coordinating, promoting and implementing transport policies and strategies.✣ DoT started proceedings early in 1995 and after various meetings with stakeholders and investigations it drafted the Green Paper on National Transport Policy. It was released to the public in March 1996. Following reviews a White Paper was drafted for key stakeholder comments. In parallel to this process was the establishment of National Taxi Task Team.

With the scene set the Land Passenger Transport Policy provided the authority for the implementation of steps to change the face of the country's transport sector. The Policy covers all passenger movements from short distance urban transport to long distance inter-city, rural and cross border transport.✣

MULTIMODAL TRANSPORT SYSTEM FOR 2050

In 2007 NATMAP 2050 was established. Its goal: a multimodal transportation system to meet SA's needs up to 2050. Planning and implementation are scheduled over five year periods and the Government utilised the World Cup last year to kick-start its plan, which saw, from 2005/06 to 2009/10, an overall investment of R170 billion allocated to improve public transport systems.

Taking this further is the Public Transport Strategy (2007 to 2020) which comprises an integrated package of rapid rail, BRT and taxi and metered taxi priority networks, in major cities – a strategy which will improve public transport services for over half the population.✣

THE FIRST SOUTH AFRICAN NATIONAL HOUSEHOLD TRAVEL SURVEY 2003 (NHTS 2003) SHOWED THAT:

- South Africans need transport services to be safer, more affordable and more secure
- The majority can get to most services (shops and post offices, police stations and hospitals) within half an hour
- The only services which a significant proportion of households claim are inaccessible are traditional healers and tribal authorities
- Access to medical services (clinics, doctors and hospitals): less than 1% of people indicated they are not able to get there. The vast majority reach medical services within half an hour
- The most accessible services are food shops. Nationally 82% of households claim they can access a food shop within 15 minutes of their homes

SUMMARY OF EXPENDITURE ON INFRASTRUCTURE 2005/06-2008/09				
Infrastructure Transfer to Other Spheres, Agencies and Departments	**Expenditure Outcome Audited 2005/06 (R'000)**	**Expenditure Outcome Audited 2006/07 (R'000)**	**Expenditure Outcome Audited 2007/08 (R'000)**	**Projected 2008/09 (R'000)**
SARCC Rolling Stock, Signalling, Buildings, Per ways	688 300	1 029 598	1 696 078	2 367 686
SARCC Public Transport Infrastructure Fund		179 000	476 000	210 000
SANRAL Road Projects	565 333	832 952	1 429 350	1 806 944
SANRAL Public Transport Infrastructure Fund			130 000	100 000
Municipalities Public Transport Infrastructure Fund	241 710	518 020	1 174 000	3 170 000
Gautrain Rapid Rail Link		3 241 000	3 029 411	3 265 993
Total	**1 495 343**	**5 800 570**	**7 934 839**	**10 920 623**

Source: National Department of Transport, Strategic Plan 2009/10-2011/12

ESTIMATED LENGTH OF ROAD PER ROAD / STREET CATEGORY – KILOMETRES 2008				
Province	Province Municipal Urban Roads & Streets	National & Numbered Provincial Roads (N/R)	Provincial Rural Access Roads	Total Roads & Street length
Gauteng	40 917	3 759	10 333	55 009
KwaZulu-Natal	33 237	9 938	54 734	97 909
Western Cape	31 830	10 293	50 057	92 180
Eastern Cape	10 124	10 505	57 855	78 485
Free State	11 484	9 836	90 033	111 353
Mpumalanga	11 471	8 444	36 110	56 025
North West	10 920	9 137	52 556	72 613
Limpopo	10 401	7 936	48 066	66 403
Northern Cape	9 145	12 173	89 877	111 195
South Africa	169 530	82 019	489 623	741 172

Source: Road Transport Management Corporation (RTMC)

82% of commuters get to work in one hour or less*

18% who travel for an hour or more are mostly black households. The average travel time for black commuters is 48 minutes compared to their white counterparts who average 30 minutes. The longest travel times are in metropolitan areas where white commuters average 35 minutes and black commuters 59 minutes.*

NATIONAL AND PROVINCIAL ROAD INFRASTRUCTURE EXPENDITURE 2005/06-2010/11							
	2005/06	2006/07	2007/08	2008/09	2009/10	2010/11	% growth (average annual)
	Outcome	Outcome	Outcome	Preliminary Outcome	Medium-term estimates	Medium-term estimates	2005/06 - 2008/09
	R million	R million	R million	R million	R million	R million	R million
Eastern Cape	1 369	1 492	1 615	1 915	1 719	1 716	11.8%
Free State	333	801	740	961	1 171	1 286	42.4%
Gauteng	610	658	1 079	1 398	1 678	1 745	31.9%
KwaZulu-Natal	1 682	1 856	2 360	4 117	3 684	3 862	34.8%
Limpopo	1 152	1 139	1 442	1 385	1 574	1 892	6.3%
Mpumalanga	723	688	993	1 115	1 089	1 321	15.5%
Northern Cape	177	236	365	436	459	573	35.2%
North West	605	689	677	730	825	914	6.4%
Western Cape	962	1 285	1 346	1 380	1 703	1 655	12.8%
Total provincial	**7 613**	**8 844**	**10 619**	**13 438**	**13 902**	**14 965**	**20.9%**
National (non-toll)	**1 783**	**2 380**	**3 403**	**5 176**	**5 649**	**7 023**	
Total	**9 396**	**11 225**	**14 022**	**18 614**	**19 551**	**21 988**	

Source: National Treasury Provincial Database

AVERAGE ANNUAL DISTANCE TRAVELLED PER MOTORISED VEHICLE BY TYPE AND PROVINCE (KILOMETRES) 2002-2008							
All fuel types	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008**
Motorcars	16 684	16 880	16 890	16 354	15 487	15 039	13 814
Minibuses	27 698	28 794	29 474	29 092	28 265	28 284	26 040
Buses	37 894	39 325	40 230	39 020	36 723	36 961	33 864
Motorcycles	10 417	10 680	10 293	8 620	7 084	6 378	5 774
LDV's - Bakkies	20 582	20 916	21 036	20 571	19 785	19 521	17 863
Trucks	40 799	42 720	43 867	43 524	43 332	44 659	41 564
Other & Unknown	1 189	1 268	1 324	1 356	1 411	1 516	1 479
Average All Vehicles	**18 279**	**18 609**	**18 699**	**18 153**	**17 303**	**16 986**	**15 649**

Source: Road Transport Management Corporation (RTMC)

I am a PASSENGER

Metropolitan areas have experienced the most significant changes in their demographics and as such all of the metropolitan areas have experienced significant growth in commuter travel from 1996 to 2003. Despite this the public transport market share has declined with changes in the modes of travel, number of travel trips, travel times and travel costs✢

REASONS FOR TRAVELLING*

The main reasons for undertaking weekday trips are to attend educational institutions, to go shopping, to visit friends and relatives or to go to work. In rural areas trips to educational institutions are the main purpose. In metropolitan areas trips to work predominate.

MODES OF TRAVEL*

The most commonly used travel mode in the country is the minibus-taxi with 22% of the population using a minibus-taxi at least once in the week. The second most frequently used travel mode is the motor car.

TRAVEL TRIPS∞

Between 1997 and 2003 the number of trips to work by all modes of transport has increased substantially from about 8.7 million trips to work per day in 1997 to about 9.9 million in 2003. According to Stats SA the number of economically active workers of 15 to 65 years of age in the SA increased from 9.8 million in 1997 to 11.6 million in March 2003. This trend is in line with the growth in population and employment. This working population has increased the absolute number of trips by both car and public transport.

TRAVEL TIME∞

It would be expected that with urban expansion and car ownership rising that there would be increased congestion and travel times would have increased, however, between 1996 and 2003 travel times decreased in all provinces except the Western Cape. The reason for this could be that employment was increasingly dispersed and therefore closer to homes and more people are working from home.

In the metropolitan areas the overall trend in travel times by settlement type 1996 – 2003 shows a slight increase from about 48 to 50 minutes for a trip to work. In all areas train travel times increased quite significantly. (The relative absence of train travel in some urban and rural areas should be noted.).

In metropolitan areas and urban areas bus travel times have increased. Minibus-taxi travel times have remained constant. Travel times are longest for the public transport modes in metropolitan areas with trains, taking the longest time, then buses and lastly minibus-taxis. Again this is an indication of congestion or urban sprawl. In Tshwane all modes of transport take longer than other metropolitan areas. For motorised travel modes Johannesburg has the longest average travel times.

The longest average times are experienced in Tshwane (averaging about 60 minutes) followed by Ekurhuleni (around 53 minutes). Shortest travel times are in Nelson Mandela, ranging between 35 and 40 minutes.

On average households are about an **½** an hour from train stations*

Bus services and taxi services are within **12 minutes** of people's homes*

COST OF TRANSPORT *

The most serious concerns about the cost of transport are related to the cost of travelling to work. The average for all public transport users is R209 per month.

TRAVEL TIMES TO WORK*	
% of commuters	**Time travel to work**
23% of commuters	up to 15 minutes
29% of commuters	16 - 30 minutes
30% of commuters	31 - 60 minutes
11% of commuters	61 - 90 minutes
7% of commuters	91 + minutes

PERCENTAGE OF HOUSEHOLD INCOME SPENT ON PUBLIC TRANSPORT*

Province	0 (% of households)	1-5% (% of households)	6-10% (% of households)	11-20% (% of households)	>20% (% of households)
Western Cape	45.7	21.8	14.5	9.5	8.5
Eastern Cape	16.9	25.6	25.1	9.9	22.5
Northern Cape	57.2	21.9	10.8	2.6	7.5
Free State	28.8	27.6	17.9	8.5	17.1
KwaZulu-Natal	19.7	22.9	23.1	14.5	19.9
North West	28.5	23.9	17.4	11.7	18.5
Gauteng	37	16.3	15	15.2	16.4
Mpumalanga	19.8	23.1	21.1	12.1	23.8
Limpopo	11.4	31.7	26.4	11	19.6

TRANSPORT ISSUES*

- Almost half of the households in SA said that their main transport problem was that public transport was either not available or too far way
- One third reported that safety from accidents and bad driver behaviour was the most serious transport problem
- For 20% the cost of transport was a serious problem
- All race groups in every province said that the most important factor when travelling was safety from accidents. Time and cost factors were important, but safety came first. If concerns about security are added the safety and security choice factors become even more overwhelming.

Nearly **3/4** of households can reach a taxi service within about **one km** of their home*

The South African transport sector employs **584 000** people in the formal and informal sectors, representing **4.3%** of the active population**

Almost 50% of households earning R500 or less spend more than 20% of their household income on public transport. Almost 70% of households earning in excess of R6 000 per month spend nothing on public transport.

AVERAGE % OF INCOME SPENT ON TRAVEL TO WORK*	
Monthly commuter income: R1-500	35%
Monthly commuter income: R501 - 1 000	23%
Monthly commuter income: R1001 - 2000	14%
Monthly commuter income: R2001 - 3000	9%
Monthly commuter income: R3001 +	5%

Of the 10 million commuters only 1.45 million commuters benefit from subsidies for travel (train and bus), so subsidies are only reaching 15% of all commuters.

NUMBER OF TRIPS MADE BY HOUSEHOLD MEMBERS PER WEEK USING EACH OF THE FOLLOWING MODES OF TRANSPORT

Mode of transport and no of trips	SA (N(1000)	Western Cape	Eastern Cape	Northern Cape	Free State	KZN	North West	Gauteng	Mpumalanga	Limpopo
TAXI										
0-10	12 603	1 402	1 655	300	749	2 343	865	3 047	938	1304
11-20	829	47	48	*	69	197	66	345	30	20
21-30	172	*	*	*	17	43	*	78	*	*
31-40	56	*	*	*	*	*	*	26	*	*
41+	152	17	23	*	16	21	11	35	*	19
BUS										
0-10	13 532	1 449	1 720	309	842	2 552	934	3 444	960	1321
11-20	120	14	*	*	*	32	*	42	*	*
21-30	17	*	*	*	*	*	*	*	*	*
31-40	*	*	*	*	*	*	*	*	*	*
41+	135	13	16	*	*	24	*	39	*	18
TRAIN										
0-10	13 549	1 443	1 716	309	854	2 569	945	3 420	972	1 321
11-20	97	17	*	*	*	21	*	58	*	*
21-30	*	*	*	*	*	*	*	*	*	*
31-40	*	*	*	*	*	*	*	*	*	*
41+	152	15	20	*	*	25	*	44	*	25

*for all values of 10 000 or lower the sample size is too small for reliable estimates

56%
Public transport as a % of all motorised trips (NHTS 2003)

*(Sources: *The First South African National Household Travel Survey 2003, Key results of the national household travel survey, Department of Transport, ^Expectations of the National Transport Master Plan, Lanfranc Situma, project manager, National Transport Master Plan 2050, Department of Transport, Pretoria, Proceedings of the 26th Southern African Transport Conference, 9 - 12 July 2007, ˇTransport Statistics 2008, Department of Transport, **Pocket guide to SA 2009/10 TRANSPORT, ‡Report on trends in passenger transport in SA, Research and Information Division, Development Bank of Southern Africa, Marina Lombard, TRC Africa, Bill Cameron TRC Africa, Mathetha Mokonyama CSIR, Andrew Shaw, DBSA, July 2007, ‡White Paper on National Transport Policy: Department of Transport, Pretoria, 20 August 1996)*

TRUCK MEDIA

- Unbelievable Impact
- High Frequency
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- High Quality Fleets

Rank	Title	[illegible]
1	Store ads	80.1
2	Trucks	79.8
3	Minibus taxi ads	75.1
4	Billboards	70.4
5	Outdoor ads	46.9
6	Bus ads	44.8
7	Bus shelter ads	41.9
8	Trailer ads	35.3
9	Train ads	13.1

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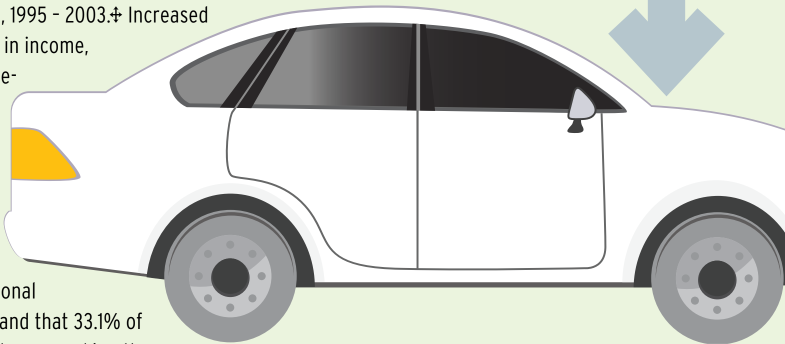
GRAFFITI

Four wheels and a steering wheel

Of the about 10 million South African that travel to work regularly, about a third travel by car and about 26% of households have access to a motorcar, making the motor car the second most used travel mode in the country.* This is despite only 19% of South Africans (eligible for a driver's license) owning a car.^

THE GROWTH IN POPULATION and employment has meant that the number of trips by car is increasing. While public transport usage has also increased, the rate of growth for cars is higher than for public transport, despite the relative share of the car mode declining slightly in the seven year period, 1995 - 2003.‡ Increased car use is attributed to changes in income, associated with a growing middle-class population in this country. ‡

Car as main mode of travel to work 32%

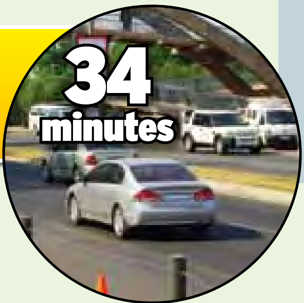


USE OF CARS

General Household Survey 2009** shows that 8% of individuals attending an educational institution travel by private car and that 33.1% of individuals go to work in a private car; making the car the most commonly used mode of transport.

TRIPS TO WORK NATIONALLY*	
Car	3 157 000
Total of all modes of travel	9 957 000

Average commuter travel times by car



STATUS SYMBOL

A household survey of the newly-emerging middle class in South African urban areas (Ungerer, 1999)^ shows that good social standing is associated with access to a private car and is driving the purchases of cars. The respondents agreed with the statement that a person's status is reflected by the products he or she uses and the overwhelming majority chose a car as the single most important product imparting the most status. This has implications for public transport services as this service will have to complete with the convenience of a private car. If public transport modes are to retain the high market share, public transport services cannot then just be seen as services for the poor members of society.^

The Land Transport Survey (Preliminary) (The Survey) November 2010ˇ excludes minibus taxis, the Gautrain, Metropolitan buses (including BRT), rental of private cars/buses without drivers and shows the number of passengers transported by road:

Year	Road and total of all modes of travel (AMT)	Total passenger transport estimates (000)
2008	Road (AMT)	283 280
2008	Total (AMT)	896 715
2009	Road (AMT)	287 797
2009	Total (AMT)	931 690
2010 to November 2010	Road (AMT)	267 397
2010 to November 2010	Total (AMT)	753 834

Travelling to work by car is taking fewer people less than 30 minutes, with many more travelling between, 31 and 60 minutes. The exception is Johannesburg, states the Survey ✣ where fewer car users are travelling more than 30 minutes to work and more are travelling in the shorter travel time categories. However, the Report then states: 'This is one of these cases where relative changes mask the true situation.' All other cities show a decline in the proportion of shorter journeys (up to 30 minutes) and an increase in longer car journeys (31 minutes or more). ✣

AREAS OF USE

The highest use of motor cars was in the Western Cape and Gauteng, with the lowest in Limpopo and the Eastern Cape.

60% of individuals used a car/ bakkie for their last business trip of 200km or more

OVERALL USE OF ALL FORMS OF CARS PER PROVINCE*	
Province	Car (in % of all people)
Western Cape	29.9
Eastern Cape	8.6
Northern Cape	16.1
Free State	12.6
KwaZulu-Natal	11.2
North West	11.9
Gauteng	25
Mpumalanga	11.8
Limpopo	7.7

Although the car market share increased slightly in rural areas, at around 10%, car travel is not a significant feature in rural SA. In metropolitan areas car share has remained constant around 40% for trips to work. Overall, in these areas there is evidence of an increase in the intensity of car uses in the morning peak period resulting in a 1.5% shift towards starting the trip earlier, before 6:30 am. Although this shift is small in percentage terms by 2003 it still resulted in an additional 100 000 car trips starting before 6:30 am.✣

CAR USE IN SETTLEMENT TYPES % OF COMMUTERS*	
Area type	Car (% of commuters)
Metropolitan areas	41
Urban areas	35.5
Rural areas	15.8

CAR USE IN SETTLEMENT AREAS % OF ALL PEOPLE *	
	Car (in % of all people)
Metropolitan	24.5
Urban	19.8
Rural	5

*(Sources: *The First South African National Household Travel Survey 2003, Key results of the national household travel survey, Department of Transport, ^Public transport service design requirements for the changing face of the South African customer, Mokonyama Mathetha CSIR, Kistan Kenny, CSIR, Transport Research Arean Europe 2008, Ljubljana; ✣Report on trends in passenger transport in SA, Research and Information Division, Development Bank of Southern Africa, Marina Lombard, TRC Africa, Bill Cameron TRC Africa, Mathetha Mokonyama CSIR, Andrew Shaw, DBSA, July 2007, ** General household survey 2009, Statistics South Africa, released May 2001 ˇLand transport survey (Preliminary) November 2010)*

METERED CAB ADVERTISING

With the growth of the metered cab industry, cab advertising has fast become an exciting, compelling and powerful format – the perfect medium with which to target audiences who do not have time to consume traditional media, but who spend a lot of time commuting. As the industry leader in this field, Graffiti established its transit media division in 2002 offering companies another innovative way of building brand awareness.

THE METERED CAB OPTION

In South Africa the metered cab is now playing an increasingly important role in today's urban lifestyle. Comments Graffiti Director, John Rice, "Metered cabs are fast becoming a convenient transportation option for those who wish to avoid driving long distances, parking problems and traffic congestion." In the same vein, many airline passengers, wishing to save time when checking in at the airport, are opting for a cab transfer to- and from the airport. In recent years there has also been a fairly significant upsurge in the number of consumers who now choose to drink responsibly and, whilst this cab culture initially took root in the Cape Town region, the other major city centres appear to be following suit. Rice also believes the increase in foreign tourism in recent years has contributed to the growth of the industry, "These tourists are used to a high-end cab service and feel at-home using a metered cab service and perceive it to be a safe option from a security perspective as well."

WHO USES THESE CABS?

These metered cabs are currently extremely busy servicing South Africa's major airports, hotels, businesses, shopping centres, social events, sporting events, bars and restaurants. Currently these vehicles travel approximately 400 kilometres a day in and around the major city centres and along the various major airport routes – ensuring high visibility for any brand particularly amongst LSM 7-10.

Says Rice, "The commuters of this LSM profile generally have a mid- to high-level of disposable income and spend a fair amount on entertainment and going out." A clear indicator of the target audience to which the cabs appeal can be seen by the locations in which the cabs can generally be found. In Johannesburg they are mainly within the northern suburbs whilst a little further north they can be seen largely within the affluent areas of Pretoria. Other popular locations include the north coast of Durban and whilst in Cape Town they travel mainly within the southern suburbs, city centre and Atlantic seaboard. Another daily route much in demand is the major airport commute within each of the main cities.

The locations that these vehicles frequent such as restaurants, bars and shopping malls also serve to reinforce the advertising appeal of the medium. A cab branded with a Whisky advertisement outside a nightclub certainly has relevance and is likely to reach its target audience. Explains Rice, "A number of the alcohol brands have been very receptive to the medium as it is obviously a positive association for them and seen as a socially responsible gesture too."

The appeal of the medium also lies in its flexibility – not only is it an attractive moving billboard, but the vehicles can be utilised at exhibitions and events to generate interest and awareness around a brand. Add to this the unique public relations and hospitality benefit of affording customers a branded transport option in which to transport VIP guests and clients, and there certainly is no more versatile advertising option." Visa, McDonalds, Puma, Virgin Atlantic, British Airways, Santam, Nedbank Capital, Coca-Cola, Caltex, Total, M-Web, Cell C and 1st for Women are just some of the blue-chip brands that have used this impact-rich way of moving their brands into new spaces.

GRAFFITI

BRANDING OPTION 1: THE LONDON CAB

The more exclusive London Cab is effective through its unique, eye-catching appearance ensuring it stands out amongst the thousands of regular vehicles on the road. Says Rice, "London has thousands of branded cabs on its roads at any one time so the vehicles are well-known and an established advertising medium. In South Africa the cars are quite unique and with that novelty factor there's no way you're going to miss one." In addition to branding the exterior of these unique vehicles, advertisers are also afforded the opportunity to brand the flip seats inside the vehicles ensuring that the overall advertising message is further reinforced. With the average passenger's journey being 20 minutes, this certainly allows more than enough time for them to view and process the content on this clever advertising medium situated directly in front of them.

BRANDING OPTION 2: THE MINI CAB

The smaller, funky Mini Cab medium has unbelievable impact and offers great flexibility from a short burst campaign right through to a long term branding exercise. These vehicles' high level of frequency coupled with the target audience travelling inside, is extremely effective at building brand awareness and triggering sales.

BRANDING OPTION 3: TAXI TOP ADVERTISING

In addition to branded cabs, Graffiti also offers advertisers the opportunity to brand a unique New York style taxi top advertising medium fitted on top of metered cabs around South Africa. The double-sided, illuminated medium sits atop the vehicle where, at eye level it is highly visible to passing consumers in daily traffic. As production rates are cost effective, the taxi tops allow for frequent changes in creative execution, allowing advertisers to get a different message across with each new execution at a very affordable rate.

As an added offering, Graffiti also provides an electroluminescent animation option whereby visuals can be made to appear as if they are moving on the taxi top background creating a unique, dynamic creative dimension to this medium.

Companies that have utilised the Taxi Top medium include 1st for Women, Superga, Visa, Pro Sano and McDonald's.

For further information regarding Transit Media, please contact Natalie Cloete at Graffiti on (011) 691 8400 or Natalie@graffiti.co.za or visit our website www.graffiti.co.za

Contact

Johannesburg	Cape Town	Durban
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www.graffiti.co.za

A DOMINATING force

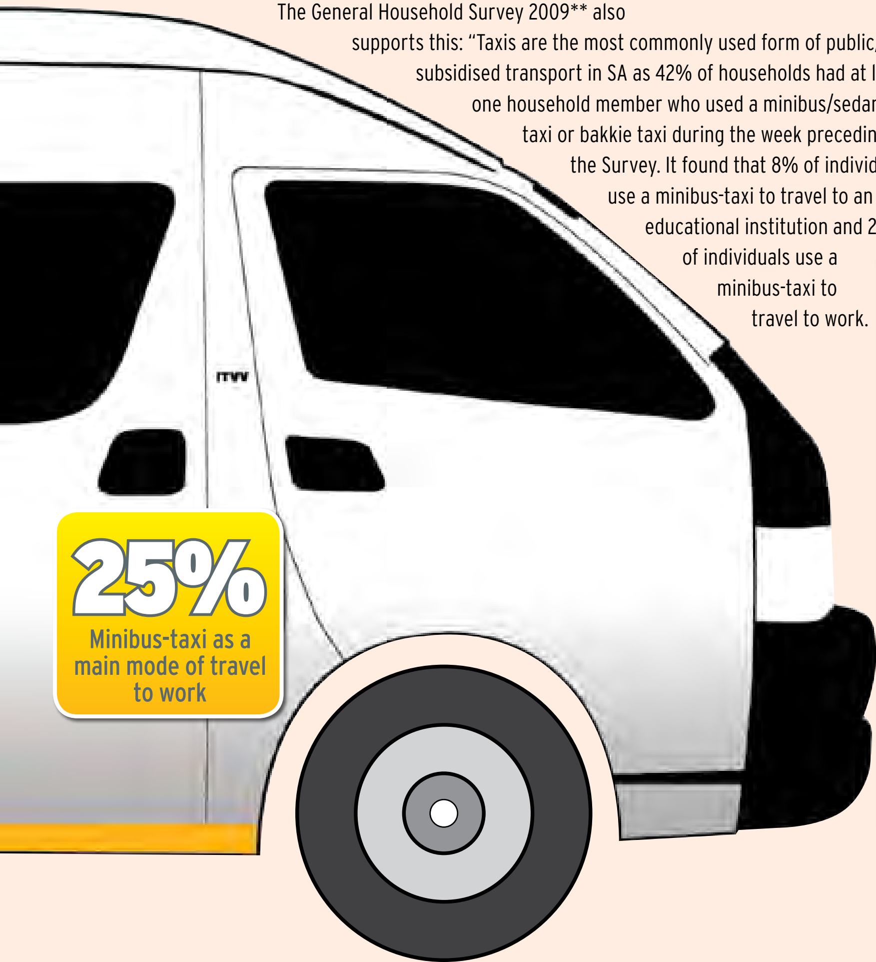
The minibus-taxi is the most commonly used travel mode in the country. This is according to the First South African Household Travel Survey 2003* which found that 22% of the population used a minibus-taxi at least once in the week. Of people 15 years and older, 19 million used taxis

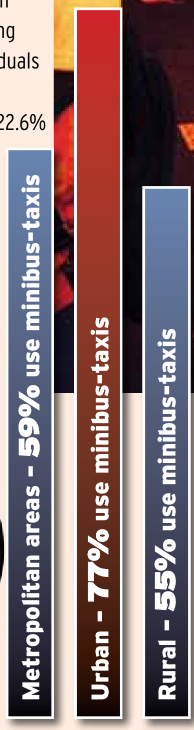
USE OF TAXIS

Minibus-taxi use increased from 1996 to 2003 from about 2 million to 2.5 million trips per day, increasing its market share for the country as a whole to 63% in 2003 from 57% in 1996. ✣

The General Household Survey 2009** also supports this: "Taxis are the most commonly used form of public/subsidised transport in SA as 42% of households had at least one household member who used a minibus/sedan taxi or bakkie taxi during the week preceding the Survey. It found that 8% of individuals use a minibus-taxi to travel to an educational institution and 22.6% of individuals use a minibus-taxi to travel to work.

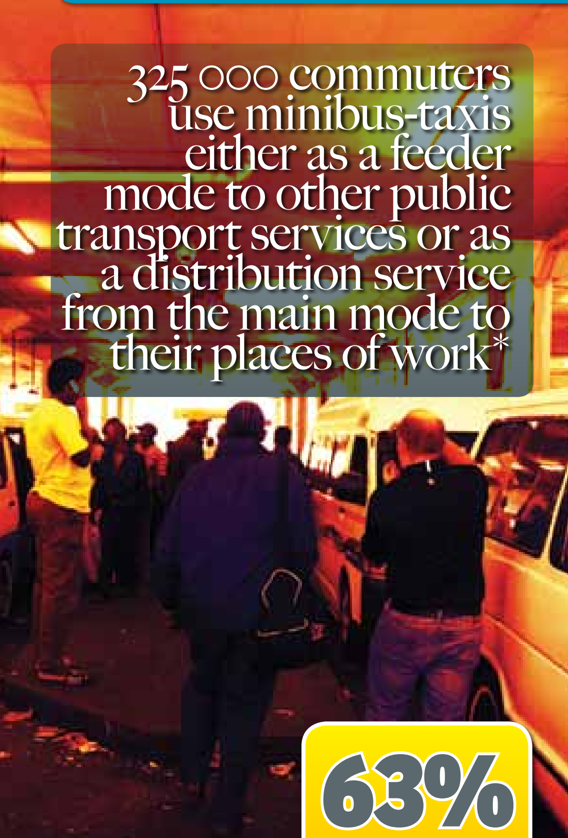
TRIPS TO WORK NATIONALLY*	
Total of all modes of travel	9 957 000
Taxi	**2 509 000**





25%
Minibus-taxi as a main mode of travel to work

325 000 commuters use minibus-taxis either as a feeder mode to other public transport services or as a distribution service from the main mode to their places of work*



63% of work commuters use taxis

Public transport is dominated by minibus-taxi services which carry **2.5 million** daily commuters

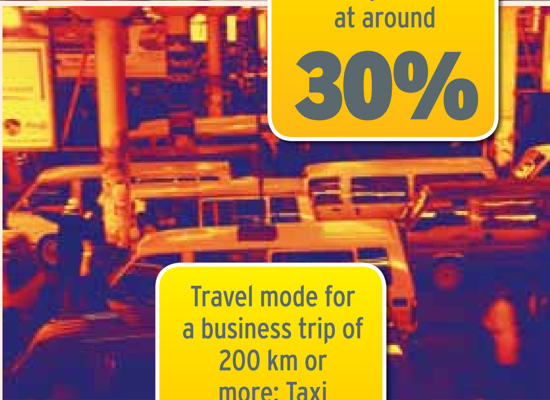
AREAS OF USE

Of the provinces, Gauteng has the highest use of minibus-taxis. While the Northern Cape had the lowest use of this mode of transport, it still had one of the largest increases of use of this mode of transport over the period 1996-2003 together with the Free State, North West and Limpopo. In all these provinces, the growth of market share has been at the expense of public bus services.

Use of minibus-taxi services is highest in Gauteng and KZN, at around

30%

OVERALL USE OF ALL FORMS OF TAXIS PER PROVINCE*			
Province	Metered taxi (% of all people)	Sedan taxi (% of all people)	Bakkie taxi (% of all people)
Western Cape	1.2	0.8	1.2
Eastern Cape	0.5	1.2	4.9
Northern Cape	0.4	0.4	0.9
Free State	0.9	1.5	0.6
KwaZulu-Natal	1.6	0.9	2.8
North West	1.0	0.4	0.7
Gauteng	1.6	0.7	1.1
Mpumalanga	1	1	1.1
Limpopo	0.6	0.3	0.7



Travel mode for a business trip of 200 km or more: Taxi

9%

Minibus-taxi use has seen the highest rate of increase of all the travel modes, even the car. There are two reasons for this. Firstly, it is the result of growth in the number of employed persons. Secondly, it is the result of the ongoing urbanisation, which has seen large amounts of people migrating to metropolitan and urban areas to find work.

In metropolitan, urban and rural areas of SA, between 1996 and 2003, the most significant growth for minibus-taxi use has been in metropolitan areas and to a lesser extent in urban areas.

Holiday travel taxi use

32%

MINIBUS-TAXI USE IN SETTLEMENT AREAS*				
	Metered taxi (% of all people)	**Minibus-taxi** (% of all people)	**Sedan taxi** (% of all people)	**Bakkie taxi** (% of all people)
Metropolitan	1.8	29.3	0.8	1.2
Urban	0.9	24.4	1.4	1.2
Rural	0.7	14	0.5	2.9

Average commuter travel times by taxi:

50 minutes

The number of work trips in metropolitan areas has increased fairly dramatically, but the market share of the travel modes has remained fairly constant. This is true except for minibus-taxi services, which have increased their relative share from 24 to 29%. However, the actual minibus-taxi market size has risen from 928 000 to 1.36 million in 2003 - a 47% increase.

In Johannesburg, Ethekwini, Cape Town and most notably in Tshwane increased minibus-taxi use has increased. In Tshwane, this usage has increased from about 10% in 1996 to 28% in 2003*. In all these cities, the gap between the minibus-taxi market share and other modes of public transport has widened. Cape Town is the only exception, where the leading mode of travel, trains, has narrowed the gap between itself and taxis. Ekurhuleni's minibus-taxi use has remained fairly constant. Nelson Mandela saw an upward swing between 1996 and 1997 – mirrored by a downward adjustment affecting bus services – but both have remained constant since 1997. ✢

SATISFACTION INDEX*

Almost half (48%) of minibus-tax passengers were dissatisfied with the quality of public transport services, while those who did not travel by taxi cited the following reasons:

- **67%** because of a lack of safety due taxi accidents
- **64%** because of a lack of facilities at ranks
- **60%** because of a lack of road-worthiness of vehicles •

*(Sources: *The First South African National Household Travel Survey 2003, Key results of the national household travel survey, Department of Transport, , ✢Report on trends in passenger transport in SA, Research and Information Division, Development Bank of Southern Africa, Marina Lombard, TRC Africa, Bill Cameron TRC Africa, Mathetha Mokonyama CSIR, Andrew Shaw, DBSA, July 2007, General Household Survey 2009, Statistics South Africa, released May 2001**)*

A new era for the taxi industry

An initiative of Government, the Minibus Taxi Recapitalisation Project, aims to formalise the country's minibus-taxi industry. The Project's objectives are to create a taxi industry that supports a strong economy and puts its passengers first while meeting the socio-economic needs of the country. It forms part of creating an integrated inter-modal transport system for the country

THE PROJECT COMPRISES TWO PARTS:

- The New Taxi Vehicle (NTV) and
- The Electronic Management System

THE NEW TAXI VEHICLE (NTV)

The Taxi Recapitalisation Project aims to:

- Improve the quality of service of the taxis
- Improve the safety of travellers
- Affordable operations
- Improve convenience to travellers
- Migrate from a cash-based fare payment system to a cashless fare payment system
- Monitor route operation, usage and revenue
- Monitor critical parameters in the vehicle and report deviations

In 2000 there were 126 000 taxi vehicles in the country. These (on average) were around 10 years old and not fit for public transport. The replacement value for the fleet was about R15 billion.

The National Department of Transport has mandated The Taxi Scrapping Administrator (TSA) to implement and administer the vehicle scrapping process. By October 2009 over 28 000 taxis had been scrapped with more than 19 000 old taxi vehicles have been received by the TSA. The TSA has also received more 30 000 scrapping application forms and paid more than R940 000 000 scrapping allowance. The Eastern Cape leads the way with more than 3 200 old taxi vehicles having been scrapped. Gauteng has received more than 6 600 scrapping application forms.

The estimated turnover of the taxi industry is at least **R10 billion nationally**

Minibus-taxis carry over **60%** of public transport users and about **30%** of workers countrywide

"Nationally the taxi fleet consists of approximately 130 000 vehicles operating with legal transport permits, with about 95 000 used for short and medium distance trips in the urban environment and the remainder for rural and inter-city transport"

PROVINCE	EC	FS	GA	KZ	LP	MP	NC	NW	WC	TOTAL
2006/07	717	356	12	549	91	148	59	37	22	1 991
2007/08	1 784	1 142	1 325	1 010	2 209	1 110	164	2 357	327	11 428
2008/09	1 465	912	2 087	853	1 384	729	149	938	691	9 208
Apr 09	1	16	7	20	31	48	-	-	1	124
May 09	1	10	32	7	1	9	-	2	1	63
Jun 09	82	77	334	131	97	110	15	87	-	933
Jul 09	103	104	405	153	108	155	23	116	-	1 167
Aug 09	159	93	378	84	208	173	20	214	23	1 352
Sep 09	350	30	209	144	309	267	22	260	135	1 726
Oct 09	23	52	54	11	6	71	22	67	20	326
2009/10	719	382	1 419	550	760	833	102	746	180	5 691
TOTAL	4 685	2 792	4 843	2 962	4 444	2 820	474	4 078	1 220	28 318
Total R *	R237 M	R141 M	R248 M	R150 M	R225 M	R144 M	R24 M	R207 M	R61 M	R1 439 M

NDOT statistics for the month ending October 2009 for Taxi Recapitalisation

THE ELECTRONIC MANAGEMENT SYSTEM*

The core components of the Electronic Management System (EMS) for minibus taxi recapitalisation:

- An Electronic Fare Collection system: based on the use of smart card technology. This will provide operators with greater security in collecting fares and will also provide information for fleet management. The collection of revenue into a single account for each operator will also lower the risks to financial organisations.
- A Monitoring and Control System: to monitor the vehicular environment and will provide information on overloading, speeding, harsh acceleration/deceleration, etc. This system will also be able to shut down the engine if certain parameters are exceeded.
- A Vehicle Identification, Tracking and Recovery System – to provide operators with information for fleet management purposes and will, through a tracking and recovery system, lower the risks to financial and insurance organisations.

PICK UP AND DROP OFF

The industry does not operate on a distance-based fare system and there are no fare meters in taxis. Routes are restricted mostly to defined areas. Taxis also do not have fixed stopping points – like the bus industry – but stop and pick-up and drop-off passengers as and when required.

The average urban trip is 18km

(Sources: Taxi Re-capitalisation Project, Department of Trade and Industry (DTI), October 2000 by author: G Cambridge and technical approval: K Roux; www.scraptaxi.org.za/; DoT)

BUSES: a rapidly changing sector

While bus services hovered around the 10% mark in 2003 overall, it experienced a downward trend in Ekurhuleni and Nelson Mandela, when the minibus-taxi experienced an upward adjustment

Passengers transported to work by bus **9%**

Bus services are within **12 minutes** of people's homes

BUS SERVICES HAVE remained constant since 1997. With the first stage of the BRT systems coming online last year in Cape Town and Johannesburg it will be interesting to see how these systems have influenced bus usage in these two cities.

From 1996 and 2003 bus use dropped from over one million to about 850 000 users.* The impact of increasing road congestion in metropolitan and urban areas has led to bus travel times increasing. In terms of public transport, buses have the second longest travel times.

Metropolitan areas - 18% use buses

Urban - 18% use buses

Rural - 43% use buses

Holiday travel **14%** use buses

38% of households do not have access to bus services

*(Sources: *The First South African National Household Travel Survey 2003, Key results of the national household travel survey, Department of Transport, **Report on trends in passenger transport in SA, Research and Information Division, Development Bank of Southern Africa, Marina Lombard, TRC Africa, Bill Cameron TRC Africa, Mathetha Mokonyama CSIR, Andrew Shaw, DBSA, July 2007)*

USE OF BUSES

83% of individuals aged 15 years and older do not use buses* for the following reasons:

- They were too infrequent
- They did not depart/arrive at appropriate times, and
- The travel times were too long.

A third of bus passengers were dissatisfied with the quality of public transport services, citing the following reasons:

- **74%** because of lack of facilities at bus stops
- **54%** because of crowding on buses
- **51%** because of low frequency off-peak

TRIPS TO WORK NATIONALLY*	
Bus	**856 000**
Total of all modes of travel	9 957 000

AREAS OF USE

In each province the bus market share has declined significantly. In the Northern Cape, Free State, North West and Limpopo bus services have lost out to minibus-taxis. The highest bus use is in KZN, Mpumalanga and the North West province. In Mpumalanga, bus services rival those of minibus-taxis.

> "Buses account for 22% of public transport.* This figure does not take into account the new Bus Rapid Transit systems that have been put in place in Johannesburg and Cape Town"

Bus services carry about
850 000 commuters

Use of a bus as a travel mode was higher in metropolitan areas than in rural areas, but bus services are significant in rural areas.

BUS USE IN SETTLEMENT TYPES % OF COMMUTERS*	
Area type	Bus (% of commuters)
Metropolitan areas	8.1
Urban areas	6.2
Rural areas	**11.6**

BUS USE IN SETTLEMENT AREAS % OF ALL PEOPLE *	
	Bus (in % of all people)
Metropolitan	**6.3**
Urban	3.9
Rural	5.7

OVERALL USE OF ALL FORMS OF BUSES PER PROVINCE*	
Province	Bus (in % of all people)
Western Cape	4.6
Eastern Cape	3.3
Northern Cape	2.2
Free State	3.3
KwaZulu-Natal	8.7
North West	6.7
Gauteng	3.7
Mpumalanga	8.1
Limpopo	5.6

Average commuter travel times by bus **68 minutes**


SPM
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EXPOSE YOUR BRAND

The benefits of BRT systems

Bus Rapid Transit (BRT) systems are an innovative transit system that acts as an exciting and cutting-edge mechanism to provide high-quality public transport networks. They combine the efficiencies and quality of metros with the flexibility and relative low cost of buses and, at the same time, provide significant environmental benefits

WHAT IS THE BRT?

World-class BRT achieves comparable levels of speed, capacity, passenger comfort and convenience as rail-based systems, but can be built at a fraction of the cost and construction time. The system provides dedicated and segregated bus-only lanes with safe and comfortable bus stations that are also friendly to children, the disabled, the elderly, as well as sight and hearing impaired passengers.

The system was pioneered in South American countries (where it was called a 'surface metro'). Since then about 100 such systems have been launched internationally, in cities including New York, Beijing and Dar Es Salaam, according to the Institute for Transportation & Development Policy (ITDP). The ITDP provides direct assistance to city governments and has been involved in the research, planning and construction of world-class BRT systems in Argentina, Brazil, China, India, Mexico, South Africa and Tanzania. It says: "For developing countries the BRT is the most cost-effective public transport model as it transports large numbers of people quickly."

EFFECTIVENESS OF BRT SYSTEMS

BRT is an important tool in battling climate change as it reduces greenhouse emissions and air pollution. In order to attract motorists to switch to using buses, the BRT system plans to increase bus speeds and to use fuel-efficient buses. Some BRT systems are approved by the United Nations to generate and sell carbon credits.

THE BRT INTERNATIONALLY

Brazil's second largest city Rio de Janeiro and metropolitan area is home to 6.2 and 11.8 million people respectively. The city is using the upcoming 2014 World Cup and 2016 Olympics to develop a BRT system. One of the BRT corridors will be ready for the World Cup, with another two lines in time for the Olympic Games. Belo Horizonte has a population of 5.4 million inhabitants and is Brazil's third largest metropolitan area with 5.4 million inhabitants. Since July 2009, the ITDP has been working with the municipality, which has made the BRT a top priority. The 27km BRT corridor Antonio Carlos / Pedro I is well underway, and the planning of the construction of next corridor, Pedro II / Catalão has begun. This first phase of BRT consists of a total of 38km of integrated corridors.

In Argentina, the 12km BRT corridor in Buenos Aires is expected to open in May. It will connect two major train stations and two subway lines. The 21 station system is expected to cut travel time by 40% and will be used by 100 000 daily commuters.

THE BRT IN SOUTH AFRICA

The BRT system was approved by cabinet in March 2007, and is a key component of the Department of Transport's (DoT) integrated transport network plan, which government implemented in 2010 for the FIFA World Cup host cities. It also forms part of the road-based component of the Public Transport Strategy, which aims to move large numbers of people to all parts of a city quickly and safely. The plan is that most city residents are no more than 500m from a BRT station by 2010.

BRT systems have been planned and various phases are in place already in Johannesburg, Nelson Mandela Bay and Tshwane.

Africa's first BRT

Lagos has a population of 17 million people and is the sixth largest city in the world. Due to the city's layout it has extremely congested highways. Before the BRT system was implemented, there was no organised mass transit system

THE PROJECT WAS ADAPTED to suit Africa while drawing from the best practices examples of BRT systems in Bogota (Columbia) and Curitiba (Brazil). Called the BRT 'Lite' it is high quality bus system that is affordable in its local context while retaining as many of the most desirable BRT characteristics as possible. It operates on a 22km route of which 65% is physically segregated from the regular roadway and 20% is separated by road markings.

Positives of the system include:

- **200 000 commuters** use this bus system daily
- Passengers enjoy a **reduction of 30%** in average fares
- Passenger enjoy a **reduction of 40%** in journey time
- Average waiting time has been **reduced by 35%**

What made the system unique was that it was delivered in 15 months and this was done at a cost of US$1.7 million per km.

The Lagos BRT-Lite System, by Dayo Mobereola (September 2009) says that it is the holistic approach of the project that has made it the success that it is. This included re-organising the bus industry, financing new buses, creating a new institutional structure and regulatory framework to support the system, as well as training personnel needed to drive, maintaining, enforcing and managing it.

A very important factor in its success was the engagement of the public and the promotion of the new system by BRT officials. This led to its quick adoption. Because the BRT officials were engaging the public, promoting the new system and because of the community engagement programme, Lagosians regarded the BRT-Lite system as a community project created, owned and used by them.

According to the *The Lagos BRT-Lite System* evaluation of the BRT-Lite system completed in the autumn of 2008, stated:

- Its users were saving travel time, had fewer transfers, were traveling cheaper, and felt safer,
- Businesses along the system's corridor were positive
- The new system improved accessibility - staff found it easier to get to work and to travel on company business

The system serves **195 000** passengers on an average weekday

In just over a year of operation it seems that the system will be able to carry about **60 million passengers**

Over 1 150 000 passengers pass through the system in a week

(Source: Sub-Saharan Africa Transport Policy Program: The Lagos BRT-Lite System By Dayo Mobereola, September 2009)

We are going

In 2006, the BRT was adopted by the city of Johannesburg to be its future flagship public transport project. Its long-term vision is to create 330km of routes, which will allow over 80% of the City's inhabitants to catch a bus

LESS THAN THREE YEARS later, at the end of August 2009, Phase 1A of Johannesburg's BRT system, Rea Vaya, began operating. This phase comprises a 'trunk route' service of 25.5km with 33 stations and operates between Thokoza Park in Soweto to Ellis Park Stadium, to the east of the inner city, with route passes Orlando Stadium, Westgate, Chancellor House, Beyers Naude Square, Carlton Centre, Fashion Square, Johannesburg Art Gallery, and the University of Johannesburg's Doornfontein campus.

Rea Vaya means 'we are going'

FUTURE PLANS

Phase 1 will be completed by 2013 and will provide 122km of mainline corridors, 150 stations and a further 250km of feeder routes.

At first Phase 1B will run from Dobsonville, Soweto and will pass the University of Johannesburg (UJ) and the University of the Witwatersrand (Wits) to Parktown and will later be extended to Sandton. Construction on Phase 1B began in February this year and is set to be completed by the end of 2011. This construction includes the upgrading, widening and reconstruction of the existing lanes for conversion into BRT lanes as well as the upgrading of sidewalks and public lighting. Three new Rea Vaya stations will also be built.

Phase 1C will see routes open between Alexandra in the north and Cresta in the west.

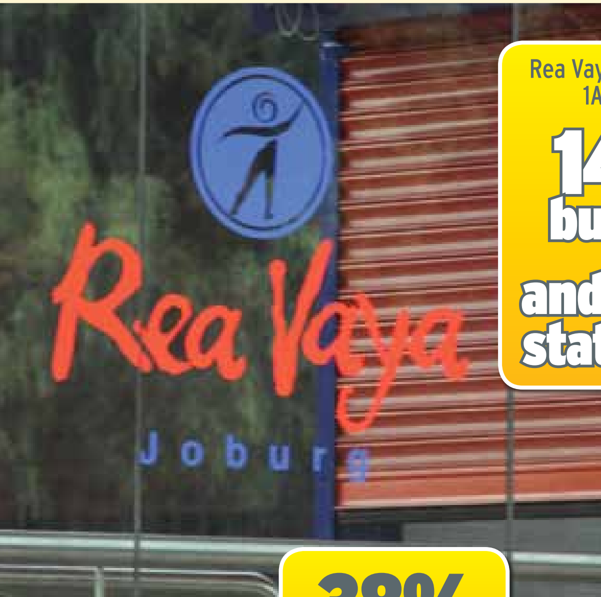
Rea Vaya is, and will be, a world-class public transport system. It will not only reduce road congestion, but will enhance the urban environment of the City of Johannesburg in the medium and long term. •

"A Bus Rapid Transit (BRT) system feasibility study carried out in 2006 found that many commuters spent two hours and 18-minutes in transit when using a taxi to and from work and spent 10 % of their income on public transport costs"

LOCAL COOPERATION

On 1 February 2011, PioTrans (Pty) Ltd took control Rea Vaya's bus operating company. The new company comprises nine Taxi Operators Investment Companies (TOICs) and is worth over R184 million over 12 years. This is the culmination of negotiations with the taxi industry that stretches as far back as 2007.

PioTrans is a partnership with Fanalca South Africa, which is a subsidiary of a South American BRT bus operating company, which manages the operations of more than 5 000 bus operations in systems such as Transmilenio (Bogotá), Transantiago (Chile), Metrobus (Panamá), MIO (Cali), and MetroSinú (Montería), SITP (Bogotá). The CEO of PioTrans is from Fanalca.



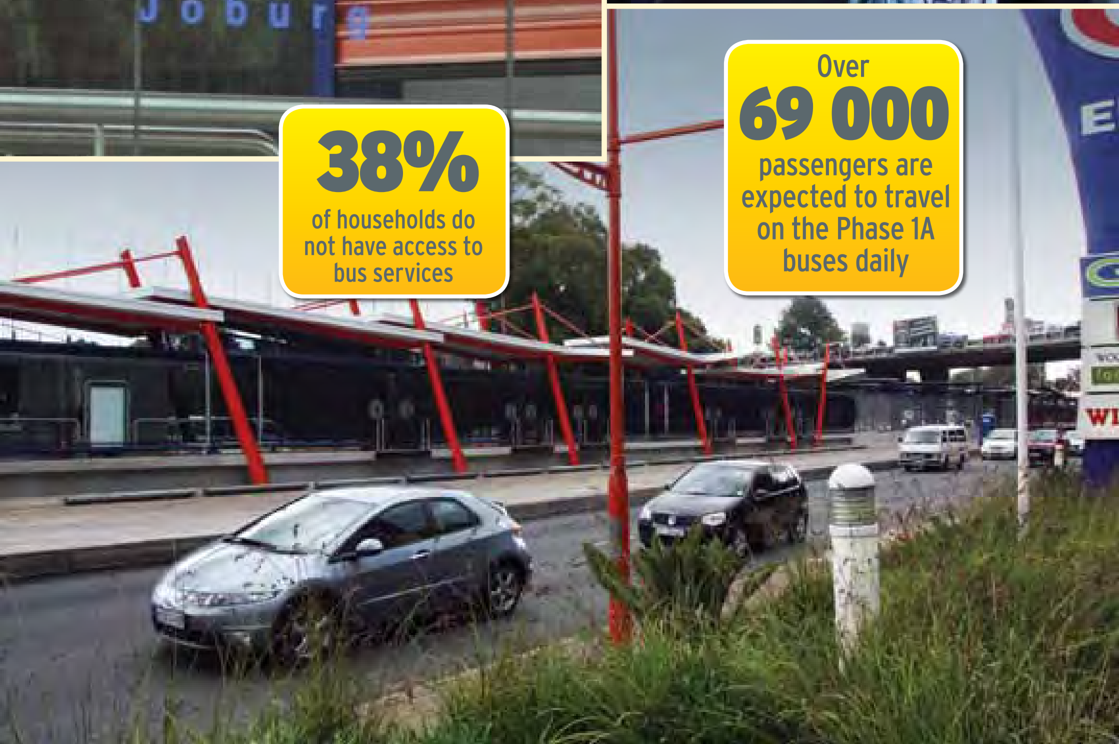
Rea Vaya employs about

1 100

people

Rea Vaya's Phase 1A has

143 buses and 27 stations



38%

of households do not have access to bus services

Over

69 000

passengers are expected to travel on the Phase 1A buses daily

MyCiTi – transforming

On 27 August 2008, the City of Cape Town approved the first phase of an Integrated Rapid Transit System (IRT) – an ambitious plan to revolutionise transport across the metropolis. The vision is to create a public transport system that allows resident to travel across the city quickly and safely on a network of smart new buses, connecting to the rail network where it exists

THE FIRST STEP FORWARD

This system of trunk and feeder bus routes will extend into every township and suburb, with a bus stop within 500m of most homes in the city. It will allow people to walk and cycle to the bus stations on a network of special walking and cycling lanes. There will also be longer cycling lanes for commuting, flanking the bus routes, wherever possible.

Special facilities such as level boarding will make the service easy-to-use for disabled people, the elderly and others with special needs.

SERVING ALL OF SOCIETY

The decision to implement this system was a recognition that hundreds of thousands of poor Capetonians struggle to commute to work on a slow, sometimes-unreliable transport system.

Meanwhile, those using cars are stuck in traffic jams that become longer and slower every year. The number of cars on the roads is causing increasing pollution and a growing carbon footprint and is choking development,

The IRT is set to change all of this.

People who already use public transport will have a vastly improved service, and many car users will leave their vehicles at home, choosing public transport instead.

PROGRESS TO DATE

- **Airport shuttle**

As host city for the FIFA Soccer World Cup in 2010, Cape Town was contractually obliged to launch a bus service between the city and airport, and a shuttle-taking people to the stadium for matches.

The Airport Bus Shuttle was launched just before the World Cup began and is continuing, running every 20-minutes from both the Civic Centre Station in central Cape Town, and the airport. The service starts early in the morning and ends well into the evening and regularly receives high praise for its comfort, reliability and excellent service from staff.

- **First commuter route**

The first major commuter route is a 'trunk (major)' route between the Civic Centre Station in central Cape Town and Table View. This service is expected to be launched in April. The City of Cape Town's IRT planning team opted to build this route first as there is no train service in these West Coast areas, while congestion is increasing rapidly.

transport in Cape Town

Other elements will be launched at the same time. These are smaller, 'feeder' services. They are interim routes, to be replaced by permanent routes when the necessary infrastructure has been built.

These interim feeder routes will take people to the main bus stations in the areas of Table View, Parklands and Blaauwberg. There will also be a feeder service in central Cape Town, travelling to the Waterfront, Loop and Long Street areas – popular for their shopping, nightlife, and the Gardens area.

The system will be launched as one unit so that many people travelling to the central city will be able to continue their journey by bus, if their destination is further away than the Civic Centre Station.

This service also links to the Airport Shuttle Bus at the Civic Centre Station, so people travelling on the West Coast route will be able to make a quick transfer to get to the airport

Permanent feeder routes will be launched for all the settlements near the City-Table View service. The permanent service in the inner city will extend to the Atlantic Seaboard and Hout Bay.

PROFILE OF AN IRT COMMUTER

The Airport service has attracted users from every socio-economic stratum, from people working in shops at the airport to business executives. In general, Cape Town's IRT is aimed at all commuters, from every socio-economic group. It will be affordable, rivalling existing public transport services. At the same time, the comfort and safety levels - and the time saved from avoiding rush-hour traffic – will entice many car users to hop on to the bus.

NEGOTIATIONS UNDER WAY

The infrastructure on this Cape Town-Table View route has already been built. It consists of bus depots, bus stations and red bus lanes. These lanes are separated from the traffic so that buses can travel quickly during peak hour.

At the moment, the City is negotiating contracts with the companies that will run the buses. This is a more complex process than building the infrastructure. These companies will be made up of taxi associations and bus companies. Their routes will be replaced by the new bus service, as is required by national law.

These organisations only qualify to be part of the new service if their routes that MyCiTi will replace are legal, and if they agree to surrender their operating licenses and vehicles. The companies have an option to be compensated for their loss of revenue, or to receive shares in an operating company, if they choose not to be part of the new service.

PART OF A LARGER NETWORK

This first leg of the route is one part of a much larger system to come. When the full extent of this first phase is complete, it will cover Paarden Eiland, Milnerton, Blaauwberg, Melkbosstrand, Montague Gardens, Table View, Du Noon, Atlantis, Doornbach and Century City.

FUTURE PLANS

The plan is for the second phase will connect the southeast parts of the city, including Mitchells Plain and Khayelitsha, to destinations across the peninsula. This phase will also cover the southern suburbs.

The third phase will include Belville, Delft, the rest of the northern suburbs and Stellenbosch, and the fourth phase the Greater Helderberg area. It is expected to take 15 – 20 years to set up the entire system, setting it up as funding becomes available.

The train service will have to be improved, but will remain the backbone of public transport in the city. ●

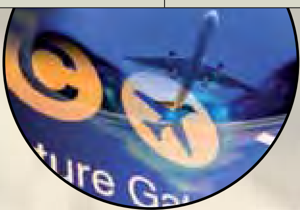
Flying high

Significant growth has been experienced by the country's aviation industry over the past 10 years. In 1993, less than 12 international airlines flew into the country. By 2009, there were more than 70 international airlines regularly flying into SA**

Passenger numbers have grown annually by more than **10%**

PASSENGER VOLUMES BY AIRPORT 2002-2008				
Airport	**2005**	**2006**	**2007**	**2008**
Bloemfontein	468 237	608 620	847 020	826 070
Cape Town	13 474 176	14 424 210	16 608 262	16 119 822
Durban	7 139 678	8 056 328	9 600 662	8 916 774
East London	1 123 698	1 276 861	1 582 432	1 488 358
George	1 157 766	1 179 084	1 294 740	1 320 801
Kimberley	217 524	258 040	253 554	299 792
OR Tambo	31 754 082	34 616 544	38 752 901	36 938 587
Pilanesberg	38 380	23 118	17 190	
Port Elizabeth	3 593 012	2 817 530	2 990 016	2 867 584
Upington	59 345	63 920	84 458	95 371
Total	**59 025 898**	**63 324 255**	**72 031 235**	**68 873 159**

Source: Airports Company of South Africa (ACSA)



PASSENGER VOLUMES BY TYPE OF AIR TRAFFIC 2005-2008

Year		Traffic Type	Traffic Type	Traffic Type	Total
		International Scheduled	International Non-Scheduled	Domestic Scheduled and Non-Scheduled	
2005	Direct transit	117 728	0	0	**117 728**
2005	Disembarked	4 093 362	8 115	10 212 911	**14 314 388**
2005	Embarked	4 214 321	12 134	10 424 322	**14 650 777**
2006	Direct transit	130 472	0	843	**131 315**
2006	Disembarked	4 411 559	11 006	11 357 318	**15 779 883**
2006	Embarked	4 424 117	26 921	11 392 226	**15 843,264**
2007	Direct transit	117 221	0	108 087	**225 308**
2007	Disembarked	4 807 346	6 300	12 297 793	**17 111 439**
2007	Embarked	4 860 597	7 856	12 377 245	**17 245 698**
2008	Direct transit	110 963	0	10 815	**121 778**
2008	Disembarked	4 935,29	8 065	12140 201	**17 083 395**
2008	Embarked	5 045 411	10 348	12 369 238	**17 424 997**

Source: Airports Company of South Africa (ACSA)

AIRCRAFT MOVEMENTS BY AIRPORT 2005-2008

Airport	2005	2006	2007	2008
Bloemfontein	19 818	20 953	17 729	27 035
Cape Town	83 931	74 743	80 467	78 030
Durban	47 313	49 802	55 434	53 562
East London	23 687	23 254	16 482	23 826
George	28 769	15 136	10 925	9 635
Kimberley	11 677	13 672	4 675	12 646
OR Tambo	199 912	217 670	233 457	225 984
Pilanesberg	5 628	5 074	4 749	
Port Elizabeth	35 082	40 099	25 276	36 425
Upington	485	2 643	4 003	5 167
Total	**456 302**	**463 046**	**453 197**	**472 310**

Source: Airports Company of South Africa (ACSA)

143 000 people took a domestic flight per month (of 750 000 business trips)

*(Sources: *The First South African National Household Travel Survey 2003, Key results of the national household travel survey, Department of Transport,** Pocket guide to SA 2009/10 TRANSPORT)*

World class airports

In its most ambitious infrastructure development programme, ACSA spent R17 billion to improve the capacity and service offerings at the country's airports. This programme has been completed, and these offerings played a significant role in welcoming World Cup visitors last year

ACSA OPERATES THE FOLLOWING AIRPORTS IN SA:

- OR Tambo
- Cape Town International
- Bloemfontein international
- PE International
- East London international
- Upington International
- George International
- Kimberley International
- King Shaka International

OR TAMBO

A complete redevelopment of this airport was started 10 years ago and ended with the completion of the R2.2 billion Central Terminal Building. This building provides one contiguous space for all domestic and international areas. The result is an improved passenger experience and orientation.

CAPE TOWN INTERNATIONAL

This airport has undergone a complete transformation, including:

- A common use central terminal with vastly improved retail and food and beverage offer
- An additional 4 000 bays in a second parkade as well as a significantly improved road network
- the introduction of an elevated drop-off kerb – a first for this airport

23 million
arriving and departing passengers pass through SA's airports annually

KING SHAKA INTERNATIONAL AIRPORT

A completely new airport for KwaZulu-Natal, King Shaka, replaced the existing Durban International Airport. It opened its doors on 2 May 2010. This state-of-the art airport was built at a cost of R6.8 billion.

OTHER AIRPORTS

Renovations and redevelopment has not been exclusive to the country's three biggest airports

- Bloemfontein International: a completed runway revamp and terminal expansion International
- East London International: a terminal upgrade
- Port Elizabeth International: runway refurbishment
- Kimberley International: terminal upgrades and expansions
- Upington International: terminal upgrades and expansions

17

ACSA airports have **won awards** including George Airport, Port Elizabeth and Cape Town international airports were awarded the first, second and third place in the ACI-ASQ Best Airport in Africa Awards in 2009

AIRPORT AIRSIDE BUSSES

- O R Tambo International Airport
- Cape Town International Airport
- King Shaka International Airport

30 Internal handles per bus

These busses carry an excess of 500 000 people per month, but are seen by many more!

Avoid the clutter inside the airport, get your brand onto the tarmac

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GRAFFITI

From chugging alo

Between 1996 and 2003 train use remained fairly constant at around 500 000. Train services, have generally retained their market share, except in the Western Cape, where the gap between trains (the leading mode) and taxis has progressively narrowed**

THE LAND TRANSPORT SURVEY (Preliminary) November 2010ˇ excludes minibus-taxis, the Gautrain, Metropolitan buses (including BRT), rental of private cars/buses without drivers and shows the number of passengers transported by road:

Year	Road and total of all modes of travel	Total passenger transport estimates (000)
2008	Rail	613 435
2008	Total	896 715
2009	Rail	643 893
2009	Total	931 690
2010 to November 2010	Rail	486 437
2010 to November 2010	Total	753 834

USE OF TRAINS

TRIPS TO WORK NATIONALLY*	
Rail	589 000
Total of all modes of travel	9 957 000

PASSENGER VOLUMES BY REGION 2008/09	
Region	Passenger volume
Witswatersrand	39%
Western Cape	32%
Tshwane	14%
KZN	13%
Eastern Cape	2%

Source: Passenger Rail Agency of South Africa (PRASA)

"Trains make up 15% of public transport nationally of which 6% of commuters use a train as a mode of travel to work, of which 15% are in the metropolitan areas, 5% in urban areas and 2% in rural areas.*"

ng to super fast

The First South African National Household Travel Survey 2003 shows that 6% of individuals of 15 years and older used a train in the month preceding the Survey. The reason given by individuals for not using a train included:

- The distance between homes and stations
- Crime

42% of train passengers were dissatisfied with the quality of public transport services for the following reasons:

- **71% because of crowding**
- **64% because of security on walk to stations**
- **63% because of security on trains**

Average commuter travel times by train:
87 minutes

Passengers transported to work by trains:
6%

Train used for business trip of 200 km or more:
2%

AREAS OF USE

COMMUTER RAIL PASSENGERS BY REGION 2002/03-2008/09

Fiscal year	235 077 217	Eastern Cape	Wits	Tshwane	Kwa-Zulu Natal	Total
2002/03	235 077 217	111 738 001	266 565 288	114 181 639	78 360 935	705 358 880
2003/04	161 040 000	485 865 633	183 282 793	76 259 437	53 481 755	481 930 103
2004/05	169 886 431	8 085 368	184 552 237	75 435 635	53 942 366	491 902 037
2005/06	160 340 041	9 009 613	190 472 080	77 568136	60 119 034	497 508 904
2006/07	177 615 334	9 608 904	197 673 999	80105 636	64 725439	529 729 312
2007/08	194 418 729	10 558 171	225 434 322	86 705 373	74 719 467	591 836 062
2008/09	208 660 400	13 801 411	250 217 067	90 043 603	83 497 757	646 220 238
% change compared to preceding fiscal year	**7%**	**31%**	**11%**	**4%**	**12%**	**9%**

Source: Passenger Rail Agency of South Africa (PRASA)

OVERALL USE OF ALL FORMS OF RAIL PER PROVINCE*

Province	**Train** (in % of all people)
Western Cape	7.6
Eastern Cape	0.7
Northern Cape	0.3
Free State	0.2
KwaZulu-Natal	1.1
North West	1.1
Gauteng	5.7
Mpumalanga	0.2
Limpopo	0.1

Train services are significant in metropolitan areas, where the overall trend in travel times by settlement has increased quite significantly. The public transport mode with the longest travel time in metropolitan areas is trains.

76% of households do not have access to train services

Trains feature significantly in the Western Cape and Gauteng, accounting for at least 10 of daily trips to work.

Rail services are within **12 minutes** of people's homes

RAIL USE IN SETTLEMENT TYPES % OF COMMUTERS*

Area type	Train (% of commuters)
Metropolitan areas	11.2
Urban areas	1.7
Rural areas	0.5

RAIL USE IN SETTLEMENT TYPES % OF ALL PEOPLE

	Train (in % of all people)
Metropolitan	5.9
Urban	1
Rural	0.3

*(Sources: *The First South African National Household Travel Survey 2003, Key results of the national household travel survey, Department of Transport, +Report on trends in passenger transport in SA, Research and Information Division, Development Bank of Southern Africa, Marina Lombard, TRC Africa, Bill Cameron TRC Africa, Mathetha Mokonyama CSIR, Andrew Shaw, DBSA, July 2007)*

Trains for a new generation

The R1.9 billion investment into overhauling existing rail stations and building new ones has catapulted the South African rail landscape into the first world

METRORAIL IS OWNED by the Passenger Rail Agency of SA (PRASA), which is a State Owned Enterprise (SOE) under the auspices of the Department of Transport (DoT). PRASA operates commuter rail services through Metrorail, in the Witwatersrand, Cape Town, Tshwane, Durban and the Eastern Cape.

The five regions combined occupy about 478 stations with a fleet of over 270 train sets making up to 3100 coaches with each coach carrying more than 100 people. This is a far cry from 1860 when on 26 June, 800 passengers experienced the first passenger commuter rail services from Market Square and the Customs Point in Cape Town.

STATIONS OVERHAULED INCLUDED:

- Cape Town (R418 m)
- Langlaagte, New Canada and Nasrec Stations (R90 m)
- Ellis Park and Doornfontein (R77 m)
- Loftus and Belle Ombre Stations (R20 m)
- Reunion (R6 m)
- Durban Kwa-Mnyandu and KwaMashu Stations (R650 m)
- North End (R16 m)
- Orlando (R70 m)

RAILWAY POLICE

Rail use by commuters has declined over the years because many saw this form of transport as unsafe. As a result, PRASA has brought back more visible policing of trains and stations. SAPS and has spent over R160 m to bring back the Railway Police

Metrorail transports over **1.7 million** passengers on weekdays in major metropolitans

STATIONS UPGRADED INCLUDE:

- Athlone Station (R5 m)
- Langa (R38 m)
- Heideveld (R18 m)
- Philippi (R75 m)

NEW STATIONS INCLUDED:

- Moses Mabhida Station (R140 m)
- Century City Station (R58 m)

A further R100 million has been invested in integrating Rhodesfield Station adjacent to OR Tambo International Airport with the Gautrain Rhodesfield Station and R263 m was spent on the Nasrec Rail Service to Ellis Park and Soccer City.

Metrorail has **478** stations with over **270** train sets which make up to **3 100** coaches with each coach carrying more than **100** people

The new stations all feature 9m super-wide platforms with 3m wide staircases, wide entrance ramps and lifts for passengers with special needs. Train arrivals and departures are monitored by an Integrated Control System while the station access control, high-tech speed gates are linked to CCTV. The cutting edge technology infrastructure upgrades amounted to R140 m and included passenger information and communications system at key stations. Intelligent transport systems will manage congestion, incident response and travel demand. ●

Flagship public

Phase 1 of the Gautrain system opened on 8 June 2010 with two distinct services – the ‘Airport Service’ and the ‘Commuter Service’. The ‘Airport Service’ operates exclusively between Sandton Station and OR Tambo International Airport, while the ‘Commuter Service’ is targeted at general commuters that need to travel between Marlboro, Rhodesfield and Sandton stations on a regular basis

PHASE 2 OF THE SYSTEM will be launched in the middle of 2011. At present civil works at the remaining stations - Park, Rosebank, Midrand, Centurion, Pretoria and Hatfield are approaching completion.

PROGRESS

In February, testing and commissioning was underway between the Rosebank and Pretoria Stations. Before entering into commercial service, each Gautrain train-set will be subjected to a long and rigorous testing and commissioning process. This process entails progressively more onerous tests on all systems and sub-systems from brakes and power, to air-conditioning and communications. In total, each train-set will complete approximately 3 000km on the test-track before being certified for operations. An important component of the Testing and Commissioning phase is System Integration testing. This entails ensuring that, not only do all train, signalling, communications and security systems function properly on an individual basis; but that they also function in a fully integrated fashion as required by a modern railway system.

Testing and commissioning will be followed by trial running. This phase will include verification of the timetable and training of personnel as well as disaster and emergency simulations conducted in conjunction with Gauteng’s emergency services.

Once phase 2 is launched, all the remaining stations will be open for commercial service on the same day. Ticket prices for phase 2 are still in the process of being finalised and will be made public in due course.

SUPPORT SYSTEMS

The Gautrain bus feeder and distributor service will also be available from all Gautrain stations, except OR Tambo International Airport. The bus service compliments the train service by transporting passengers between Gautrain stations and surrounding suburbs and

In 100 days of opening for commercial service, the Gautrain had achieved
1 million
passenger trips

transport

business nodes, to/from areas that are within a 15km radius of each Gautrain station. The bus schedules are designed to match the train schedules. The proposed routes and exact bus stops for phase 2 will be made available once the relevant municipalities have approved them.

Parking facilities are in place (at all stations except the Airport) for Gautrain commuters who still need to rely on their cars to get to a Gautrain station. The facility will enable commuters to leave their vehicles at the provided parking areas within the station precinct, proceed to board the train to their destination, and later pick-up their vehicle upon return from the trip. A 'kiss-and-ride', drop off facility is also available at all stations for 15 minutes.

CHANGING USER PERCEPTIONS

An evaluation of the planned Gautrain feeder and distribution system, DJ King and B Samuals, CSIR Built Environment, quotes a survey conducted on potential users of the Gautrain – *Synovate Gautrain Survey 2006*.

According to this survey:

- Only **48%** of (then) current private car users between Tshwane and Johannesburg would be likely or extremely likely to use the Gautrain as their main mode of transport between cities
- **81%** of (then) current taxi commuters between the two cities said they would be likely or extremely likely to use the service
- **50% of car drivers** believed that the Gautrain would offer a safer trip than a car journey
- **70% of taxi users** thought the Gautrain would be safer than a taxi journey
- **55% of car commuters** thought the Gautrain would be cheaper than a car journey
- **47% of taxi users** thought the Gautrain would be cheaper than using a taxi
- **55% of car drivers** said they did believe that the Gautrain would not reduce traffic problems on Gauteng roads

Post-World Cup, ridership 'normalised' at approximately

8 000

passengers per week day

THE GOLD CARD

What makes the Gautrain system so easy to use is that the Gautrain train, bus and parking fares are charged on the same cashless smart card system. So, commuters can transfer easily between the different services using the same, reusable smart card – the 'Gautrain Gold Card'. Only valid Gautrain Gold Card holders are allowed on the Gautrain system as automated technology is used to verify tickets – no cash is accepted. Customers are able to load a variety of different journey products, ranging from single trips to monthly tickets, onto the same credit-card sized card and to re-use the same card over and over again without having to buy a new ticket for each journey. Customers using more than one service within a single journey enjoy a reduced fare. Customers are also able to register their cards with the Gautrain operator which enable immediate blacklisting of the card should it be lost or stolen. Any unutilized value on the lost card can then be transferred to a new card. Gautrain Gold Cards may be purchased (or topped-up) at any ticket office or ticket vending machine at any Gautrain station. These outlets accept cash as well as credit and debit cards. Pre-loaded Gold Cards can also be purchased specific retail outlets.

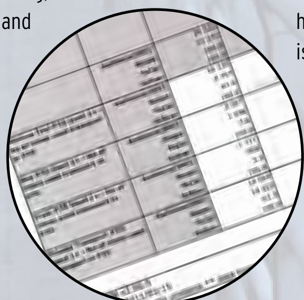
OVERVIEW

This section presents some research on the transit sector that has been commissioned by some of the media houses that offer opportunities to brands and companies in this sector. As Out of Home (OOH) media is not in a controlled environment and SA does not have its own currency as some other countries, such as the UK and Australia do, media houses have invested into research on OOH media. While this means there is a wealth in information on the transit sector as part of OOH media, it also means that one needs to be careful in how you interpret this data, as it must be kept in mind that it was commissioned by a media house. The decision to place some of the research commissioned by the media houses in the Transit Guide was not taken lightly. However, it was felt that together with the information from independent sources it provides the reader with a better understanding of the transit landscape. This section should, therefore, be viewed in this light

SAARF AMPS

The following charts and tables are from the SAARF AMPS survey which covers the total adult population of SA

THE SAARF AMPS SURVEY considers adults from 2009 to include 15 year olds, bringing SAARF in-line with international practice. The survey uses personal in-home interviews with thousands of people representative of the total South African adult population. Interviewers use laptops to do the interviews, utilising double screen computer assisted personal interviewing (DS-CAPI) to conduct the interviews. The questions cover the use of the mass media including all available radio and television stations, all the major sold newspapers and most major consumer magazines. Special interest consumer magazines are also included. Outdoor advertising, e.g. billboards and trailer advertising, as well as cinema are covered and a battery of questions on Internet and cell phone usage is included.

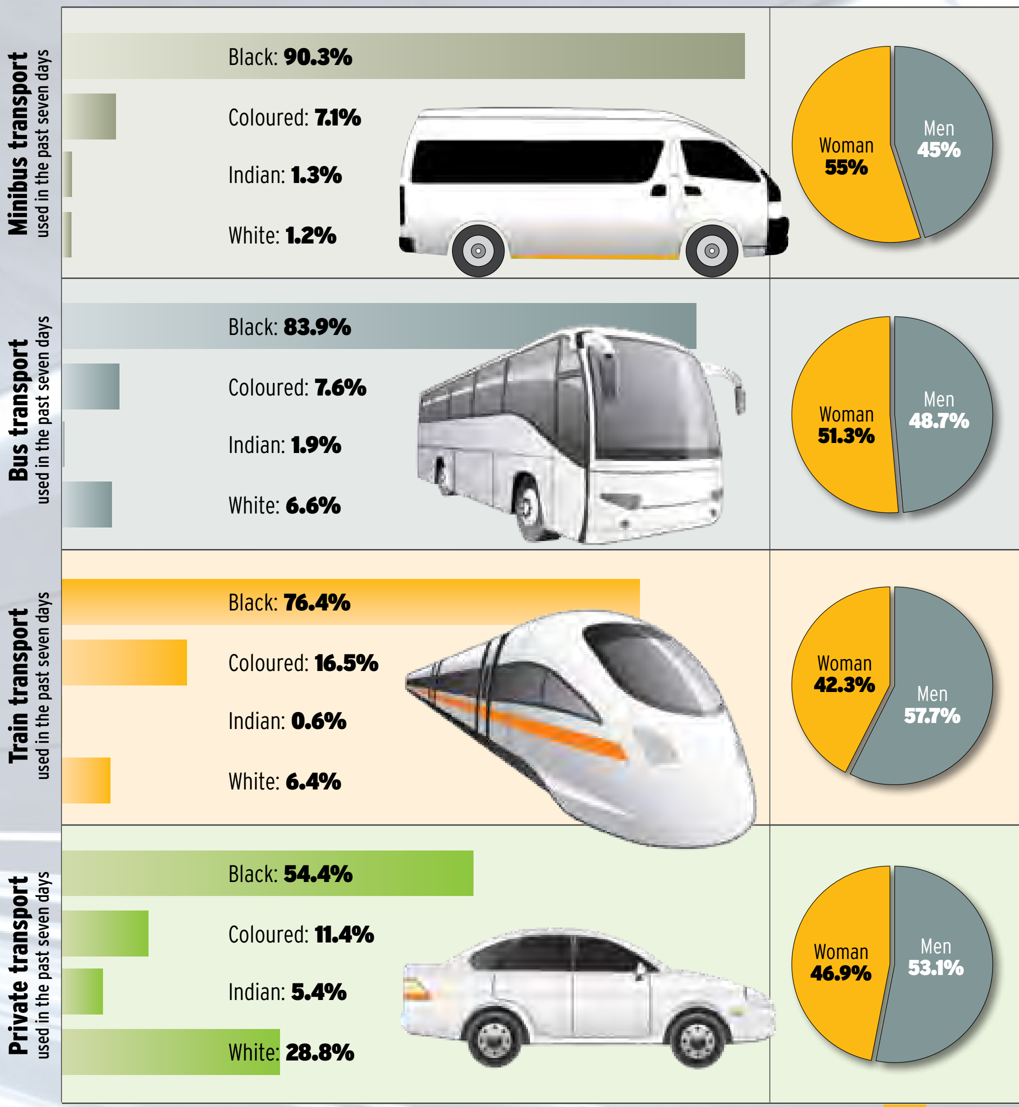


In addition, there is a host of questions about the ownership of motor vehicles, durable items and small appliances, mobility (travelling) patterns, the use and purchasing of dozens of personal and household products, as well as personal and household details. The use of financial services and numerous other activities such as holidays, sport and shopping patterns are also covered.

From 2001, the measurement of product data has been done via self-completion questionnaires, which are left behind at the end of a personal interview so that respondents can complete them in their own time. The product categories are measured on the basis of units personally used or purchased by a person or a household. As from the second half of 2002, information is also gathered on approximately 1 500 brands thereby enriching the product information enormously. The fieldwork period for the data is AMPS July 2008 – June 2009 and AMPS July 2009 – June 2010.

TRANSPORT USED BY POPULATION GROUP

GENDER SPLIT



Minibus transport
used in the past seven days

Province	%
Western Cape	**7.9%**
Northern Cape	**1.3%**
Free State	**7.8%**
Eastern Cape	**12.6%**
Kwazulu-Natal	**23.3%**
Mpumalanga	**8%**
Limpopo	**10.4%**
Gauteng	**20.4%**
North-West	**8.3%**

Bus transport
used in the past seven days

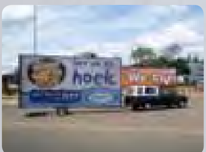
Province	%
Western Cape	**11.1%**
Northern Cape	**0.5%**
Free State	**5.8%**
Eastern Cape	**11.9%**
Kwazulu-Natal	**22.7%**
Mpumalanga	**8.9%**
Limpopo	**14.6%**
Gauteng	**17.3%**
North-West	**7.1%**

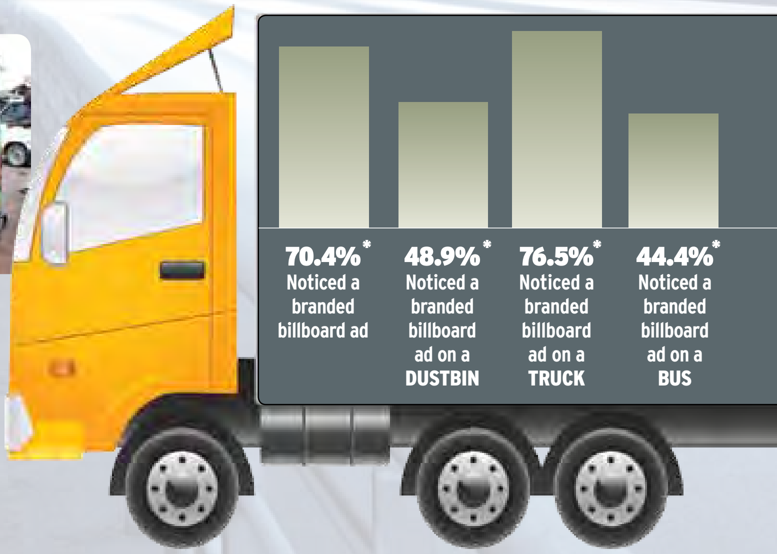
Minibus transport
used in the past seven days

LSM	%
LSM 1-4	**30.7%**
LAM 5-6	**47.6%**
LSM 7-8	**16.6%**
LSM 9-10	**5.1%**

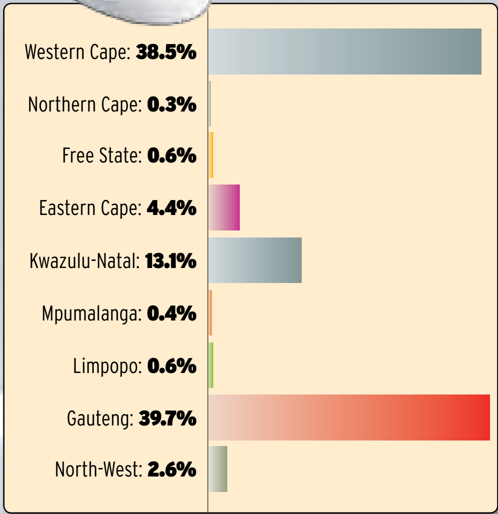
Bus transport
used in the past seven days

LSM	%
LSM 1-4	**30.2%**
LAM 5-6	**42.5%**
LSM 7-8	**19.3%**
LSM 9-10	**8.1%**

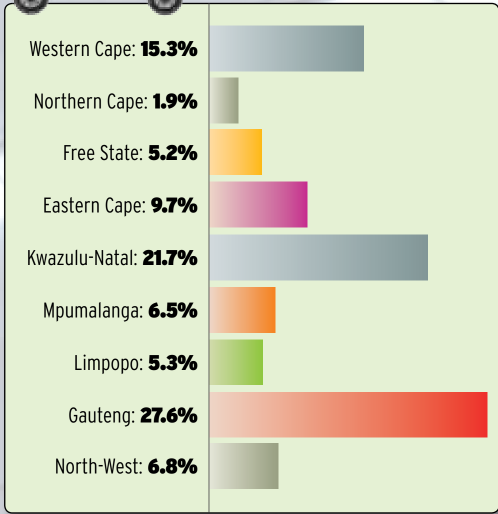




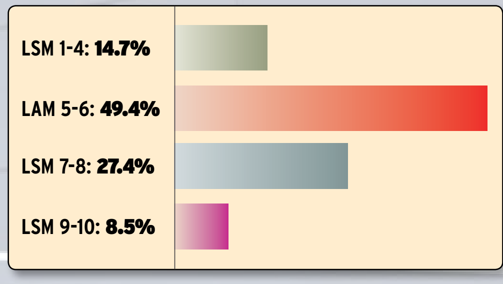
Train transport
used in the past seven days



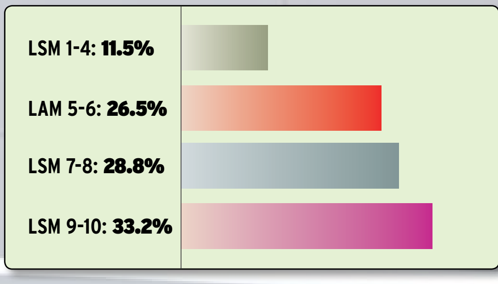
Private transport
used in the past seven days

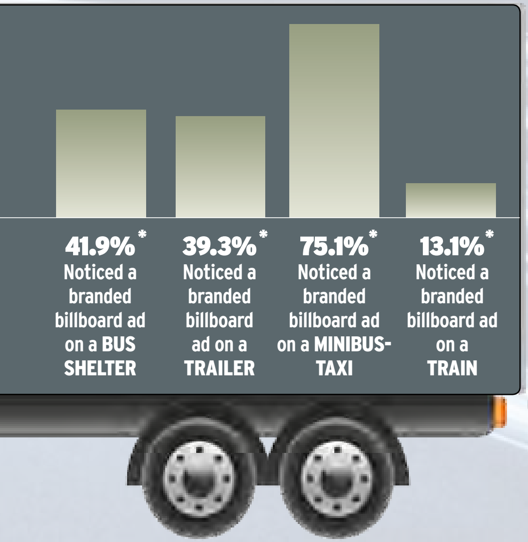


Train transport
used in the past seven days



Private transport
used in the past seven days





*Within the past seven days
AMPS July 2008 - June 2009 and
AMPS July 2009 - June 2010

Provantage of 'In-Ta

For a marketer it can be somewhat of a daunting task to decide which media channel to use and how best to communicate a brand message to consumers in this fragmented landscape. For the most part, Above the Line (ATL) media channels continue to dominate overall marketing investment in South Africa. *Monique Leech*, account director, Millward Brown, examines how Below the Line (BTL) is faring in this environment, demonstrating her case with research into In-Taxi TV (TTV) carried out on behalf of Provantage

THERE IS NO DOUBT that the media world has become more fragmented than ever before. South Africa has gone from a handful of TV, radio stations and print publications in the early 80s to hundreds over the last few decades.

According to Nielsen's ADEX database (which keeps track of all ATL advertising spend across all brands and channels in South Africa), 2010 saw an 18% increase in overall media investment compared to 2009 with R13.4 billion invested behind TV advertising, R6.7 billion behind newspapers,

R3.6 billion behind radio, R2.5 billion behind magazines and R1.2 billion outdoor. Yes, part of this investment is due to increased advertising over the FIFA 2010 World Cup, but the trend holds true: Above the Line (ATL) media continues to be the key focus for marketing budgets in South Africa.

Perhaps the fact that there is a common media currency to compare channels, weigh up reach and frequency, and track performance helps in keeping these channels firmly imbedded in a media plan. Providing marketing directors with insights on Return on Investment (ROI), becomes a little easier when there is a general consensus amongst the media and marketing community of how the channel works and what it has to offer a brand.

INSIGHT INTO BTL

But how does one provide insight into BTL advertising such as activations, mall advertising, branded advertising on vehicles and advertising on TTV? There are no common media currencies and no quick checks whether reach and frequency targets have been met against a specific demographic.

One way to do this is to look at advertising across various channels. Undeniably creative impact of an execution has a role to play in how well that execution would perform in any given channel. How much money you put behind a specific execution will also determine whether or not it might eventually cut through. However, if all ads were equal (in creative and media pressure) which channel offers the better return? Is being average on TTV better than being average on any other channel?

THE CASE OF TTV

TTV offers a cost effective way to drive advertising awareness, recall and liking for brands (more so than some conventional above the line channels).

Millward Brown has tracked every TTV launch advertisement since 2007 and has built up a norms database of over 109 000 respondents over four years. The same methodology has been employed to enable comparison to above the line channels from Millward Brown's Adtrack database (covering in excess of 35 000 above the line launch advertisements over the last 30 years).

There are three key norms that have been used to track an advert's cut through performance during launch. These include spontaneous advertising awareness across channels, verified noting (which is spontaneous playback of the correct execution flighting) and overall liking (a score out of 10, 10 being 'I like it a lot').

xi TV' advertising

- **TTV contributes more to awareness than print or radio:** Comparing the norms it is interesting to note that while TV continues to dominate the overall advertising awareness stakes at 61%, advertising on TTV contributes more to awareness (22%) than print advertising (18%) and double the awareness of radio (11%).

- **Recall of TTV (ads is double that of radio and triple that of outdoor:** Perhaps even more surprisingly, is that verified noting for TTV advertising is higher than any above the line support mediums. Advertising recall on TV dominates at 38% followed by TTV advertising at 15%. The average recall for print advertising is 10%, radio is 7% and outdoor is 5%.

- **Some categories also tend to perform better on TTV than conventional TV:** The norm for QSR category (Fast Food) on TV is 30%, whereas on TTV it is 40%. Other category norms on TTV are; financial adverts 11%, telecommunications 17%, retail 14% and non alcoholic beverages 19%. Most importantly consumers have the same emotional connection with ads on TV as they do with those on TTV. The average liking for TV ads is 8 out of 10 and similarly for TTV (7 out of 10).

- **It is likely to the fact that TTV in so many ways emulates conventional TV advertising.**

It is a rich audio visual medium that in fact operates very much the same as TV.

Key learning's around which creative elements work on TTV, simply mirror what we already know about conventional TV advertising:

- Executions with complicated story lines or lots of writing/ wording tend to fair poorer than those with a clear cut interesting story line. This is because understanding is key to the success of an ad in this market. If consumers do not understand an ad, all positive measures (persuasion, enjoyment, branding and appeal) are likely to be lower for an execution. So do not try and overcomplicate the story or use analogies that are difficult to understand.
- Ads with both emotional and rational elements tend to garner the highest level of persuasion. It is thus important to provide consumers with a strong reason to believe to sell your product/ service
- Ads do not generally need to be adapted significantly for TTV. Ads that cut through on conventional TV will cut through on TTV and ads that generate a poor response on TV will do the same on TTV.

A KEY OPPORTUNITY TO COMMUNICATE TO THE EMERGING MARKET

For media planners and marketers TTV offers a key opportunity to communicate to the emerging market as two thirds of commuters fall between LSM 4-6 (according to AMPS 2009). It is also undoubtedly a captive audience as commuters spend an average of 20 minutes in a taxi. During which time they have higher engagement with this medium than radio or outdoor and similar levels of engagement, compared to print.

So, while the media buying currency may not be the same, we know that TTV as a channel provides a great support platform to grow brands.

ABOUT MONIQUE LEECH

She graduated CUM LAUDE from the University of the Free State with a degree in Marketing and Communication, and has eight years in market research, spanning across various industries, including, FMCG, Banking (Corporate and Personal), Retail, Telecoms and Automotive. She has vast experience across Concept, Pack and Product Tests, Brand Health tracking, Copy Testing; Media Monitoring and Tracking; Usage and Awareness Studies across several countries including South Africa, Kenya, Ghana, Nigeria, England, France, Spain, Russia, Turkey, Saudi Arabia, Lebanon, and the UAE. Monique is also the author of many published articles both on line and in Market Research magazine titles and in 2009 received a SAMRA award for her contribution to research in Africa.

Length, depth and breadth of

Freshly Ground Insights (FGI) conducted their annual research commissioned by ComutaNet, and again have blasted myths out of the water. The research focused on the urban commuter, with a substantial cross section of the commuter market interviewed in their natural environment; the urban taxi rank

PREVIOUS FGI/COMUTANET research had revealed that the average commuter has more disposable income than was initially assumed by media owners. "Confirmed current results expose the urban commuter as the lion shareholder of 58% of the overall commuter market segment and currently command 74% of the sector's total value. This should be considered in conjunction with the fact that the urban commuter sector grows year on year and their spending power is also climbing steadily," states Terence Marsh, CEO, and the ComutaNet group.

MORE DEPTH

These fascinating facts should be kept as the backdrop some of the most valuable research findings – the urban commuter sector has more depth than anticipated and can be further differentiated into four sub-sections; each receive and react to various media in their own unique way. Brad Aigner, managing director of FGI has labelled these four sub-sections as follows:

- Suburban Stylers
- Solid Citizens
- Hungry Hot Shots
- The Madalas

When profiling these categories, FGI considered a number of factors such as age, average income and professional stature, spending patterns and their social habits, among others. One of the features of the urban commuter that is consistent throughout is the entrenched use of the taxi infrastructure, albeit only for convenience in some instances.

SUBURBAN STYLER

The Suburban Styler, usually male aged 40-55, is a professional who has succeeded in his corporate career or as an entrepreneurial businessman. Typically residing outside of the township with family and friends still at 'ekasi', he is likely to be the owner of his own vehicle, but still commutes occasionally due to convenience. This sub-section represents 15% of the overall urban commuter base.

SOLID CITIZENS

Your typical urban commuter falls within the Solid Citizens category. These are the men and women aged 20 – 50 who form the backbone of the middle-of-the-pyramid working class. Brad Aigner says: "This sector, which constitutes 57% of total urban commuters, relies heavily on the taxi infrastructure as they commute for all activities outside the home; work, shopping and socialising." This segment, which is the largest, also has the highest spending power and most disposable income.

HUNGRY HOT SHOTS

Hungry Hot Shots are aptly described as such. They are the young, ambitious, hardworking commuters, who mainly commute out of necessity as they are not as yet earning the professional salary that would afford them the freedom to choose when they commute. Aigner states,

Commuter media confirmed

"This sector shares all of the same characteristics of other youth; they are smart, modern, stylish, opinionated and sussed."

MADALAS

Lastly, the Madalas – our older, more traditional commuters, generally reside in the township. Besides basic demographics, this sector is differentiated by the times at which they commute. While they still commute daily, they do so outside of the 'high times'. The Madala's also rely on commuting for all activities including socialising and shopping throughout the day.

The above mentioned commuter groups, with the possible exception of the Madala's, spend on average three hours of their day on the daily commute – from waiting at the rank for the taxi to the actual return journey.

DIGITAL MEDIA FORMATS

This evolution has also seen the inclusion and enhancement of digital media formats such as Rank TV. Digital augments commuter media, such as Rank TV, in the same way, it does all other media: greater flexibility, more creativity, varied content and shorter lead times. This allows for the selection and broadcast of content relevant to the audience; from SABC news programmes to local sports events. Furthermore, regional adjustment of advertising audio in the relevant vernacular allows one to communicate with the commuter meaningfully and respectfully, rather than speaking at them. This is applicable for Comuta Radio too.

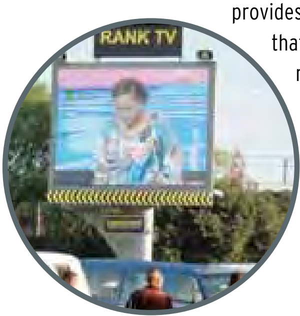
Such relationship building tactics have established a great amount of trust amongst commuters in the media. Research reveals that advertising on commuter media is highly trusted with seven of the 10 most perceived trustworthy brand advertising, present on the commuter media platforms. Ad recall rates show that brands that are represented in the commuter environment enjoy higher recall than those that advertise on traditional media alone. Not surprisingly, the top noted brands are present on more than one platform; making use of branding, an AV component such as Comuta Radio or Rank TV and taxi wraps. Further to this, continuity is also key: the top 6 brands most vivid in the commuter psyche have a 3.7 year combined average run of uninterrupted advertising.

This is not saying that transit media can replace traditional advertising – but it significantly augments advertising efficacy when used in conjunction with other media platforms. Due to the daily demands of the working class, traditional media have specific peak times during which they reach the masses. While the same is true of transit media; the latter is able to reach the 19.5 million commuters at various high-convergence points across the country – when traditional media is not available to access them! Therein lies the ability of transit media to 'lift' a brand's profile in this diverse market.

LOOKING FORWARD

Upcoming research looks to gain further insight into the changing behaviour patterns of the urban commuter and its identified segments. Unpacking the routine of each of the aforementioned commuter segments: Solid Citizens, Madalas, Suburban Stylers and Hungry Hot Shots in terms of their commuting, shopping, socialising, communication and technology habits is bound to open a new set of valuable insights to further refine the presentation of transit media. Also, on the agenda for the 2011 research is the determination of media consumption and efficacy within the market as well as their preferred, inspirational and rejected brands.

"Our annual research is not only supremely beneficial to ComutaNet, but really to the industry as a whole, as it provides the insights that ensure that well-planned and executed marketing reaches its intended audience with the desired effect," concludes Marsh.



The effectiveness of taxi advertising in a developing context:
an analysis of regular taxi commuters in SA*

The mobility of South Africans is increasing drastically as illustrated in the 3% increase in urban commuters in last year alone. The recent upgrade of existing roads and development of new transport infrastructure will drive this trend even further resulting in new and improved transit media options for advertisers

By Thérése du Plooy

HOWEVER, STUDIES ON THE effectiveness of specific media and types of out-of-home (OHM) advertising are limited to a few: billboards from the perspective of advertisers or users, posters in the promoting of cultural events as well taxi advertising. It is clear that very little has been published in academic journals or textbooks on the effectiveness of OHM, specifically taxi advertising in a developing country, such as South Africa.

The effectiveness of taxi advertising in a developing context: an analysis of regular taxi commuters in SA, is a study undertaken from September to October 2010 by the Tshwane University of Technology of which Thérèse du Plooy is the coordinator.

The main purpose of this study was to determine the effectiveness of taxi mini-bus advertising in South Africa by assessing regular taxi commuters' attitudes, attention and perceptions toward taxi advertising. Data for this study was collected by 360 personal interviews with regular taxi commuters in Tshwane, one of the largest metropolitan areas in South Africa. The fieldwork was conducted by B Tech Marketing students at the Tshwane University of Pretoria under close supervision of their lecturer Thérèse du Plooy. This project offered these students an opportunity to gain valuable practical experience in the field of market research as well as insight into taxi advertising, one of the most promising OHM types in South Africa.

BACKGROUND

In South Africa, 19 million people commute daily. A large portion of these commuters leave home before six and arrive back home after six, allowing limited time for exposure to most media. Every day commuters spend on average two hours in taxis or waiting at taxi ranks. The average income of this emerging class is increasing annually and their spending is no longer limited to basic products, but also includes luxury brands and products.

Therefore, taxi advertising is the ideal medium to reach the emerging market and can effectively target pedestrians, drivers and vehicle passengers in specific areas. Also, it offers a combination of mobility and visual impact. It can be used by advertisers to target specific rural, semi-rural and urban areas by selecting taxis that travel the same routes repeatedly in the area. Although transit advertising is currently an under-utilised outdoor advertising medium, it may be the one medium that can offer the solution to the increasingly cluttered outdoor advertising space.

STUDY METHODOLOGY

A stratified sample was applied by intercepting taxi commuters at 18 formal and semi-formal minibus taxi facilities in a selected area. Respondents, who passed the data collection point at or close to the selected taxi ranks, were screened and invited to participate in the study. A structured questionnaire, with a 5-point Likert scale, was used to investigate the views of regular commuters on taxi advertising specifically dealing with the way that the medium is perceived and accepted as well as it effectiveness.

STUDY RESULTS

Some of the major results of this study will now be highlighted:

ABOUT THÉRÈSE DU PLOOY

Thérèse du Plooy has a BCom (Law) and BCom Hons (Marketing) from the Potchefstroom University for Christian Higher Education (now the North West University) and a Masters degree in Marketing at the University of Pretoria. She lectured in Marketing at the then Technikon Pretoria, and then worked in sales and marketing in the media and advertising industry. She returned to the academic world in 2002, whilst still maintaining her good relations within the advertising and media industry. She has received several other merit awards by the Tshwane University of Technology for outstanding performance in research and is a member of professional bodies such as SAIMS (Southern African Institute for Management Scientist) and SAMRA (South African Marketing Research Organisation). She also represents her department at their DRIC (Department Research and Innovation Committee) as well as the Examination Quality Committee.

The demographic profile of respondents is shown in Table 1. Females made up 54% of the total sample while the majority of respondents were younger than 30 years (43%). An average household income of less than R5 000 per month was reported by 65% of respondents. It is also clear that majority of the taxi commuters are employed and earning disposable income. Almost half (47%) of the commuters are full-time employed and 14% part time. The household income of the majority of respondents (54%) is below R8 999, while almost 20% has a household income between of R9 000 and R16 999. Ninety-three per cent (93%) of commuters interviewed were black African (93%).

Table 1: PROFILE OF REGULAR TAXI COMMUTERS INTERVIEWED

	%
Gender	**46.7%**
Male	53.3%
Female	100%
Age	
19 - 30	43.30%
31 - 40	27.80%
41 - 50	16.10%
50 +	12.80%
Working status	
Work full-time	47.20%
Work part-time	14.40%
Housewife	1.90%
Student	21.40%
Retired	2.50%
Self-employed	5.60%
Unemployed	6.90%
Monthly household income	
R0-R8 999	53.90%
R9 000-R16 999	19.20%
R17 000-R24 999	3.10%
R25 000 +	2.50%
Race group	
African	93
White	2
Coloured	4
Asian	0

55.6%

Public transport as a % of all motorised trips (NHTS 2003)

Table 2: GENERAL VIEW OF REGULAR COMMUTERS TOWARDS TAXI ADVERTISING

	Frequencies %		
	Strongly Disagree/ Disagree	Neutral	Strongly agree/ Agree
I like to look at taxis covered in advertisements.	17%	28%	55%
I like to look at advertisements inside the taxi	21%	26%	54%
I like to listen to radio advertisements inside the taxi	13%	21%	66%
The concept of taxi advertising is a 'creative' one	11%	26%	63%
I have spoken to other people about the branded taxis/taxi advertisements I have seen	51%	17%	32%
I am familiar with the brand names advertised on taxis	19%	14%	67%
Taxis with advertisement are usually cleaner	35%	35%	30%
Taxis with advertisement are usually safer	47%	34%	19%
Taxis with advertisement are usually more comfortable	42%	35%	23%
Overall I feel positive towards taxi advertising	12%	28%	60%

The attitudes of regular commuters towards taxi advertising are illustrated in Table 2. The strong positive attitude towards taxi advertising is evident. The average rating of commuters' perceptions towards taxi advertising was 3.6, with 64% who agreed or strongly agreed that they felt positive towards taxi advertising.

The findings of the study are more far positive than one would anticipate. It is unexpected to find contemporary consumers expressing positive views towards the use of any advertising medium, as it is well established that the people often make every effort to avoid the increasing number of advertising messages attempting to catch their attention.

More than two thirds (67%) of the respondents indicated that they are familiar with the brand names advertised on taxis, supporting the view that taxi advertising is very effective to reinforce an existing message or to maintain high levels of awareness for leading brands. However, 63% perceive taxi advertising to be creative and novel, implying that it can also be use to attract the attention of this target market to launch new brands. The highest perceived item is associated with 'listening to radio advertisements inside the taxi' (M = 3.67, SD = 0.97) clearly supporting the integration of radio advertising with transit media to increase the effectiveness of a campaign aimed at this market. However, the average of 2.74 implies that commuters do not usually discuss advertisements on taxis with other consumers.

The majority of the commuters interviewed also felt that the presence of taxi advertising do not influence their perception about the safety (77%), cleanliness (70%) and comfort (67%) about taxis itself (77%).

PERCEPTION

Table 3 shows the perception towards taxi advertising by regular commuters. Most of the respondents interviewed enjoyed taxi advertising and almost 60% perceive it as an important source of information when making purchase decisions. Interesting to note is that the majority of commuters do not perceive taxi advertising to be clutter (52%) or as visual pollution (58%). Less than half of the respondents (45%) disagreed that reckless driving might influence their attitudes. So, a concern for advertisers might be the potential negative effect of dangerous driving by taxi advertisers on perceptions towards their brand. This needs to be kept in mind by advertisers and suggest that only reputable suppliers of transit media should be considered.

Table 3: PERCEPTION TOWARDS TAXI ADVERTISING BY REGULAR COMMUTERS			
	Frequencies %		
	Strongly Disagree/ Disagree	Neutral	Strongly agree/ Agree
I like advertisements on taxis	19%	28%	53%
Taxi advertising is a valuable source of information to me	15%	26%	58%
Taxi advertising makes the environment look unattractive	58%	27%	15%
There are too many taxi advertising	52%	29%	19%
Reckless driving by taxis drivers influence my perception towards the advertised brand negatively	45%	24%	32%

Table 4: ATTENTION PAID TOWARDS TAXI ADVERTISING BY REGULAR COMMUTERS			
	Frequencies %		
	Disagree	Neutral	Agree
I often notice brands/advertisements on passing taxis	15%	14%	71%
I often read brands/advertisements on taxis	19%	12%	69%
I often read brands/advertisements inside taxis	18%	19%	64%
I pay attention to the new branded taxis/taxi advertisements	23%	29%	48%
I remember branded taxis/taxi advertisements more than advertisements in other media	52%	25%	23%

The consumer of today lives in a ruthlessly cluttered environment and therefore grabbing their attention is often imperative for message delivery. The attention paid towards taxi advertising by regular commuters is reported in Table 4. While half of the commuters indicated that they do not have a better recall of taxi advertising when compared to other media, the findings of the study do revealed the potential effectiveness of this medium. Taxi advertising clearly has the ability to attract attention, since 71% of the commuters reported that they have noticed advertisements on passing taxis. A total of 69% of respondents indicated that they read advertisements on passing taxis, and 64% inside taxis.

CONCLUSION

Since perceptions towards taxi advertising were mostly positive, this seems to be an accurate indicator of the effectiveness of the medium. As perceptions are one of the most reliable measures of effectiveness, this study showed that taxi advertising is significantly effective as a transit-advertising medium from a commuters' perspective. The findings suggest that the medium is more effective when respondents have a more positive outlook towards advertising in general. The Cronbach alpha values were within the acceptable range, indicating acceptable internal consistency reliability for all items measured considering that the study was an exploratory study.

**A list of references used in this study is available on request.*

Talking TRANSIT

Transit media is everywhere! Literally, every taxi rank, train station and airport has been garnished with advertising; if it's not the massive billboards and taxi wraps, its high-energy activations that introduce brands to the masses, before their workday has even started

TRANSIT MEDIA IMPACTS even those who use their own modes of transport. Just take Telkom's 8ta for instance; the friendly-looking cartoon characters wrapped around just about every third taxi before they even knew what it was intrigued everyone! But is transit media the way to go for every client?

Transit environments offer high convergence points of a relatively captive mass audience of economically active consumers. The chosen transit location(s) will depend on the type of market one will be communicating with - ranging from mid to high LSM to the mass working class, across all race groups.

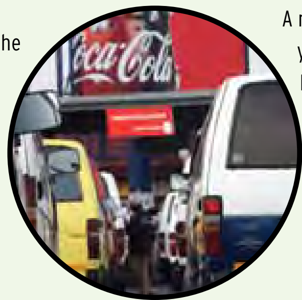
SUITING THE SPACE

Isilumko Media, powered by Studentwise, carefully align clients' strategic objectives with the appropriate environment to ensure that clients' receive the highest return on their investment.

Lauren Durant, operations director, Isilumko Media emphasises: "Refining the communication strategy to suit the space and target audience is the secret to gaining maximum mileage for this high-impact marketing channel.

QUALITY PROMOTERS

Another vital component is the selection of suitable and competent promoters for implementation. All too often, the quality of the promoter and, therefore, the quality of the engagement with the commuter is compromised on the assumption that scrutiny will be limited due to the size and scale of the transit space.



TAILORING YOUR OFFERING

A must in current days of media specialisation is tailoring your offering to the medium; therefore, Isilumko Media has introduced the likes of Q talk and Motor Mouth that offer brands interactive customer exposure beyond the confines of the rank. To ensure comfort and convenience for commuters, promoters engage with them on the latest product/service while the commuter waits in the queues - this is Q talk. With the average queuing time per commuter being upwards of 30 minutes, it makes more sense to bring the experience to the queue rather than expect a commuter to visit a stationary promotional container for information.

A RELATIONSHIP OF TRUST

Likewise, Motor Mouth, sees well-trained promoters actually complete the journey with commuters on a taxi. This allows for an in-depth exchange and is perfect to establish valuable customer insight and to complete some dipstick market research. "The cohesive link between the activations and other promotional branding in different transit spaces," continues Durant, "not only drives home product awareness and maintains brands top of mind position, but also supports the relationship of trust built through the activation. By carefully encompassing several relevant environments one creates an integrated Below-the-Line (BTL) campaign that achieves its strategic objectives."

Activating nationally for a multitude of diverse clients - from driving Sunday Times subscriptions in Eastern Cape taxi ranks to welcoming local and international guests at the opening of King Shaka International Airport - Isilumko Media has executed successful activations in just about every transit arena.

A CLASS ACT

Supporting one of the country's largest alcohol brands, Amstel, Isilumko Media engaged hoards of commuters in Durban, Cape Town, Johannesburg and Pretoria to solicit entry to Amstel's Class Act. The Class Act reality series, through which stars are born, utilised Studentwise promoters to encourage South African talent to attend auditions.

"What I believe really drove the Amstel Class Act campaign was the fact that we engaged with the target market on various levels: at taxi ranks, on campus and in taverns. This integrated BTL campaign targeted potential talent while in transit, at their place of study and when socialising. And through the use of persuasive brand activators we were able to encourage large volumes of would be stars to audition. In particular, the transit space gave the promotional teams enough time to really drive home the auditioning message. Word of mouth in the ranks was also amazingly powerful," adds Durant.

A QUICK TURN-AROUND TIME

Challenges are to be expected with any campaign; but when we were contracted, with three days' notice, to source over 100 high-quality promoters to assist with the opening of King Shaka International airport - that was a new one for the record books. The 'Hostess and Care Agents' tasked to assist the airport's existing frontline staff with the influx of foreign and local visitors during the World Cup also had to undergo official landside training and induction before commencing duties.

"A total of 1 090 shifts and 10 days later; the campaign executed at King Shaka International Airport served as confirmation to our clients; and to ourselves, of what can be achieved - even under stringent deadlines," continued Durant.

BEING CREATIVE

While turn-around time can be crucial in any campaign; creativity is also essential, as was proven in the drive for entries in Mango's 'Win a Plane' campaign; which saw the distribution of folded airplane pamphlets at OR Tambo International Airport for a total of 12 days.

"Whether reaching your average consumer or a high LSM group; the transit space is an undeniable force within marketing and advertising today!" Durant concludes.

Providing OOH solutions

PROVANTAGE OUT OF HOME MEDIA is one of South Africa's fastest growing Out Of Home (OOH) companies. Since inception in 2003, when it offered an activation service, it has continuously added new products and services to its portfolio to enable its clients to effectively deliver brand messages to their target audiences.

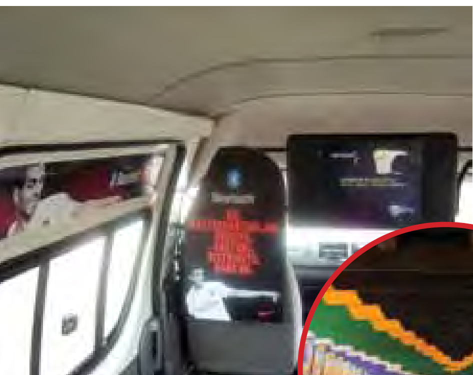
It has grown to provide events management, tavern activations and outdoor advertising. It has brought significant innovation into the transit space with In-Taxi Television (TTV) and it has exclusive rights at King Shaka and Cape Town International airports. As part of the mix, it also has a billboard portfolio in all major metropolitan areas.

The company prides itself in always adapting to and anticipating the changing landscape of OOH advertising. It has the vision to use new technological developments to create new opportunities for its clients and has received industry acknowledgement for this when it received the MOST Innovator Award 2010. Provantage will continue to invest heavily in this key area.

Its team of executives and management staff bring a wealth of knowledge and experience from a number of industries including media, marketing, advertising and event management. This rich diversity ensures constant innovation and perfect pitch delivery on every single campaign, while regional offices and regional warehousing infrastructure ensures that campaigns are properly implemented and managed in all areas of the market and trade.

In addition, its has decided to make substantial investments in four key areas – research, people, operations and information systems and innovation. It has also aided in job creation and skills development and is a level-4 empowerment contributor.

Provantage endeavours to be a world-class operation that can compete with the best locally and internationally. Their



mix of offerings is a 360-degree solution that optimises marketing investment, which in turn translates to better results and the satisfaction of its biggest investors – its clients.

Proadvantage prides themselves on their ability to communicate brand messages that deliver the desired results. Whether it is awareness, sales or a specific call to action – its media are measurable and results driven.

Its current range of offerings includes:

- Transit Media
- TTV (In-Taxi Television)
- Taverns
- Outdoor
- Activation

TRANSIT MEDIA

In South Africa, consumers are becoming more mobile due to urbanisation and centralisation of economic activities. Nearly 20 million commuters are dependent on public transport every week. Provantage is the only company in South Africa that can offer clients integrated transit media solutions on all the transit platforms including taxi advertising, bus advertising, train advertising, airports advertising, TTV, mobile trailers and transit activations. Provantage was recently awarded the exclusive rights to all the PRASA (Passenger Rail Agency of South Africa) stock which includes trains, platforms, stations, billboards and broadcasting.

TTV

In-Taxi Television (TTV) has been broadcasting successfully for four years. The fleet consists of 1 000 taxis nationally, reaching four million viewers per month. Our TTV system, consisting of custom-made, fitted 17-inch plasma screens, offer advertisers and viewers an unrivalled audio-visual experience during their daily commute. Partnerships with DSTV, SuperSport and others ensures that content is relevant and entertaining.

TAVERN

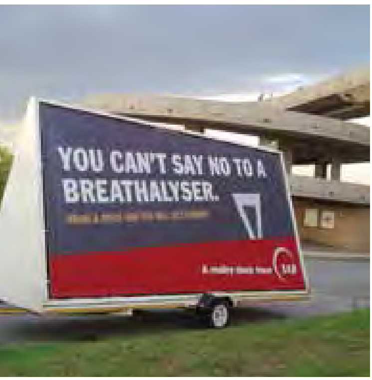
Provantage Tavern media is an exciting platform that enables brands to reach the young fashionable black segment of the population in up-market taverns and bars throughout South Africa. With sites in all major metropolitan areas, Tavern media, through activations and advertisements, presents an opportunity for brands to interact with this market in a laid-back social environment.

OUTDOOR

Billboards, building wraps, airport advertising and car washes ensure that clients' brands reach millions of consumers in all provinces of South Africa. Using innovative, imaginative and unique displays that draw attention and create awareness, these highly visible communication tools reach a wide variety of audiences.

ACTIVATION

Activation creates an experiential marketing interaction between the brand and the consumer. It speaks directly to the client in a familiar environment where they can touch, hear, see and even smell the brand. It has a first class training facility that is structured with its clients' and campaign needs in mind, thus ensuring the continued success of this highly effective medium.



The advantage of advertising on buses

"THERE ARE NO disadvantages if one looks at this alternative form of advertising," says Charl Timms, CEO, SPMedia "only advantages."

Bus exteriors are exposed to mass volumes of traffic and pedestrians every day. This allows for a much broader reach generating far more brand impressions than what is possible with a static medium.

"Bus advertising," says Timms "is distinctive and prominent allowing for messaging to be changed on a regular basis to accommodate brand promotions and multiple brand messaging."

Interior bus advertising is also highly effective with mass commuter volumes on a daily basis. This medium enables a relevant brand to target the captive commuter audience with the opportunity to even engage with the commuter through en route marketing and activation campaigns.

States Timms, "Last year nearly 20 million commuters used public transport every week, of which three million commuters travelled by bus. It is interesting to note that almost two out of every three South Africans aged between 16 and 24 make use of public transport giving marketers a captive audience with over 4.7 million people in this age group alone."

According to the AMPS figures for July 2009 to June 2010, bus exteriors are viewed by motorists who generally fall into the LSM 6 – 10 bracket while the commuters on the buses fall into LSM 5 – 7.

"This for me is one of the exciting aspects of transit bus advertising, the fact that advertisers are able to reach the same audience on a daily basis with any marketing message, on a national scale."

"Marketers can use this type of advertising medium for launching a new product as well as reinforcing a brand. Brands like Coca Cola, PEP, VISA, Samsung, Sowetan and Suzuki Automotive South Africa, amongst others, have all utilised SPM bus advertising successfully as part of their overall media strategy to reinforce brands and to communicate their existing campaigns, maintaining top of mind awareness. Coupled with our national footprint, we have a winning formula."

"Brands like 8.ta, Cell C and Nedbank Cup have also relied on bus advertising to not only launch their brands into respective markets but also to amplify their launch impact and period. In a lot of instances, new brands or products will utilise bus advertising as part of their original launch strategy and then continue with the platform to reinforce communication".

"Utilising bus advertising as part of the advertising mix will create a cost effective alternative Out of Home strategy with a high reach and frequency ratio. It will amplify the campaign with a powerful brand demonstration to two different target audiences simultaneously. These larger than life multi-dimensional billboards showcase the brand and entrench awareness on strategically chosen geographic routes at any time of the day." •

ABOUT SP MEDIA

SP Media offers a national footprint on bus advertising. This medium is extremely unique in that it can reach two distinctly segmented target markets at one time. Motorists view the exteriors of the buses, while interiors are viewed by commuters who travel on the buses. The national mobile media units are exposed to traffic, motorists and pedestrians for a period of eight hours every day

A full media stable

ComutaNet has evolved its range of services to bring clients a 360° solution. Under three main umbrellas - Activations, Audio Visual and Outdoor - the commuter media stalwarts have both condensed and expanded their services for client convenience and return on investment

ACTIVATIONS

Experiential Campaign & Customised Road Shows

- Customised activations at key township hubs
- Industrial theatre combined with dance; competition elements; trained and engaging promoters keep audiences enthralled - staging and sound set the scene for 'edutaining' brand activations

Kitchen – adding a little flavor

- Catering on the move with unique mobile unit to any location nationally
- Interactive and entertaining - ideal for sampling and events - comes with sound and a DJ

Roving Stage Trailer

- Mobile billboard trailers with audio systems and foldout stages for edutainment and crowd interaction
- Massive branded backdrop

In Queue Activations

- One-on-one engagement in region specific vernacular with a captive audience
- Distribute leave-behinds (leaflets, samples and other)

Gazebo

- Branded gazebo setup within ranks
- A home base setup provides the optimum platform to include additional brand elements in order to elevate a brands' presence e.g. display stands, cutouts and other POS material, which in turn creates strong visual recall

In-Taxi Activations

- Dedicated promoters are allocated to specific taxis or routes for the day to engage one-on-one with travelling commuters
- Data capturing and/or sms database generation opportunity

AUDIO VISUAL

Rank TV

- 12m^2 giant screens, elevated 5m off the ground for ease of viewing are installed in 13 of the biggest taxi ranks in the country and reach 2.6 million viewers weekly
- Content is sourced from SABC and internal bite size creations keep commuters glued

Comuta Radio

- Comuta Radio reaches 2.5 million (unduplicated) commuters daily through major commuter hubs nationally
- Comuta Radio is a live, interactive digital satellite radio station broadcast daily in multi-vernacular as per regional requirements

OB Unit

- The mobile OB unit takes radio content to the people throughout SA with live crossings to Comuta Radio
- Creative campaigns using the combination of interactive, branding and radio broadcasting

OUTDOOR

Transit - Taxi Advertising

- Interior and exterior branding of taxis for maximum impact and exposure
- Reach includes all South Africans who travel daily therefore reaching various LSM groups with one medium
- Includes full taxi wrap, mega taxi and quantum's

Transit - Bus Advertising

- Advertising on the interior and exterior of buses in major metropolitan, urban and rural areas
- Route selection and Station-to-Station buses target higher LSM consumers targeted, with a single bus generating 500,000 impacts p/m

Transit - Mobile Ticket Offices

- Branded Mobile Ticket Offices strategically positioned at bus depots countrywide to sell tickets to bus commuters

Static - Rank Branding

- Allows exclusive naming rights with advertising 'ownership' of the major taxi ranks throughout SA

Static - Light boxes

- Back-illuminated mini-billboards offer client 24-hour brand presence on the concourse at Park Station

Static - Front-lit Billboards

- Billboards in the queuing aisle above commuters at the busy Jack Mincer / Noord Street Taxi Rank

Static - BrandMarks:

- Four-sided permanent branding portrait containers with the option of a large 3-D object display on top

Connecting consumers on the road

Brand new to South Africa and Primedia Unlimited, brandyourcar.com launched in September 2010. It is in essence a moving media initiative with a strong.com link that connects consumer lifestyles with leading brands, products and services

BRANDYOURCAR.COM IS THE first to offer advertisers the opportunity to brand privately owned vehicles, selected from a database of 15 000 people who have made their vehicles available – online – for branding purposes.

Consumers and their cars then become moving billboards within targeted audience communities and lifestyles. brandyourcar.com provides an exclusive, mobile platform within the environments where typical consumers spend time – travelling to and from the gym, the supermarket, specific primary or high schools, or sitting in bumper-to-bumper traffic on main arterial routes. Not only is brandyourcar.com providing exponential reach and branding to consumers in these environments, it enables the owner of the vehicle to effortlessly earn additional income.

Car owners need simply log onto www.brandyourcar.com to sign up and add their personal details. brandyourcar.com will then match advertisers' objectives with a selection of privately owned vehicles and drivers that meet with specific demographic, geographic and psychographic criteria. Car owners have the final say in the specific advertising for which their car has been earmarked. Drivers merely upload a monthly photograph of their vehicle to prove the branding has been maintained in order to trigger payment.

CAMPAIGNS

To date brandyourcar.com has run a short term, tactical SterKinekor campaign, specifically targeted to the Fourways area. Moms with school going kids were selected and 100% of the drivers visited either Fourways Mall or Cedar Square more than four times a month. Glade Auto also ran a highly targeted campaign in that drivers were selected due to the fact that they would be travelling to coastal areas over the December period. Cars were also selected to suit the creative execution.

Currently running with brandyourcar.com are Samsung, Iwyze and Budget, to name a few.

BENEFITS

Among other benefits, brandyourcar.com offers advertisers an affordable option to enter the world of outdoor advertising without having to deal with the typical restrictions such as limited site availability and council approvals. The brandyourcar.com concept ties in seamlessly with radio, TV and through the line campaign activities, with the added benefit of flexibility and mobility, which traditional OOH media lack.

For example, a sportswear brand can select to advertise on specific 4X4's, driven by men under 35 who travel regularly to the gym and sports clubs. These drivers are already the brand's target audience, plus they go on to become brand ambassadors while travelling their regular routes and going about their daily activities. To illustrate the flexibility of the medium, drivers could be further incentivised to make their branded vehicles available for tactical use.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