

*Bahrain Media Survey*

London and Manama, January 2014

Sacha Orloff Consulting Group in partnership with Tawasul Al Khaleej consulting firm, has conducted a survey on the role of media as a catalyst for market information and data among businesses in the Kingdom of Bahrain.

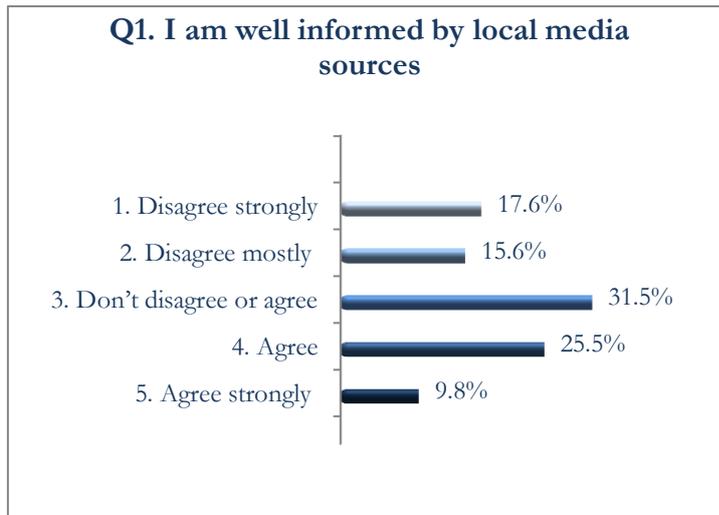
We have used the term media to broadly encompass communication tools such as print media, social and digital media, internet, television, broadcasting, and radio.

The survey was distributed and spread in the Kingdom electronically through a population sample of business leaders; including C.E.O's, business owners, private sector and governmental representatives.

This survey becomes especially important as the Kingdom of Bahrain has been awarded the capital of 'culture' and 'tourism'; and in May 2013, with Manama being named the capital of Arab Media. This status will act as a turning-point in Bahrain's media industry, driving increased regional awareness to the Kingdom's role in the media industry; enhancing standards of excellence, attracting investment and strengthening the performance of this sector.

The purpose of this survey is to analyse the current perception of this industry as media is a key player to strengthen Bahrain current economic growth and its future transformation, on consumer views and insights and how they engage with media.

Question 1: I am well informed by local media sources



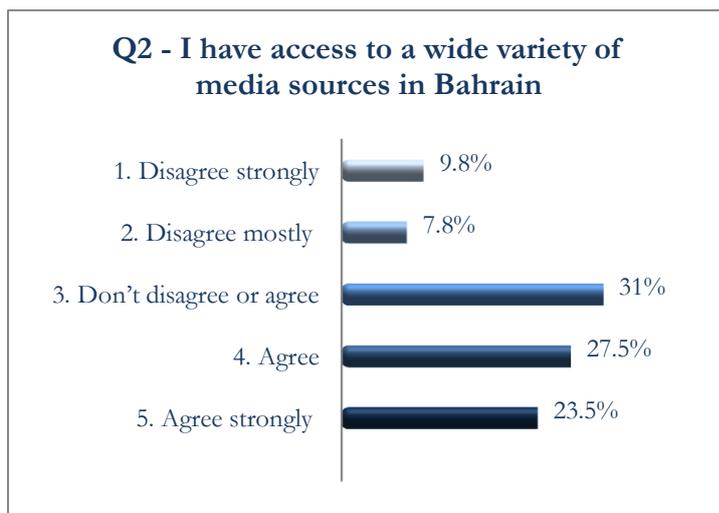
The results show that:

- **31.5 percent** of the respondents neither agree nor disagree, followed by a total of **35.3 percent** who agree and strongly agree. This shows a majority of the population finds local media sources satisfactory.

- **A total of 33.2 percent** of the respondents **disagree** with the

statement, and believe **improvements** could be made to provide more **adequate media sources** and channels to the population and businesses.

Question 2: I have access to a wide variety of media sources in Bahrain

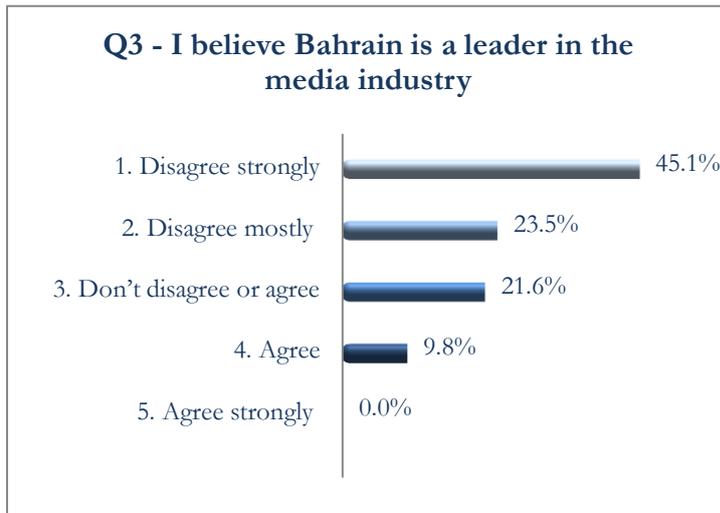


- **A total percentage of 51 percent** of the respondents **agree** and **strongly agree** that there is a wide variety of media sources;

- **31 percent** are satisfied, or don't have a strong opinion concerning the wide access to media sources;

- **A minority of 17.6 percent** disagree that there is a lack of choices of media in Bahrain

**Question 3: I believe Bahrain is a leader in the media industry**

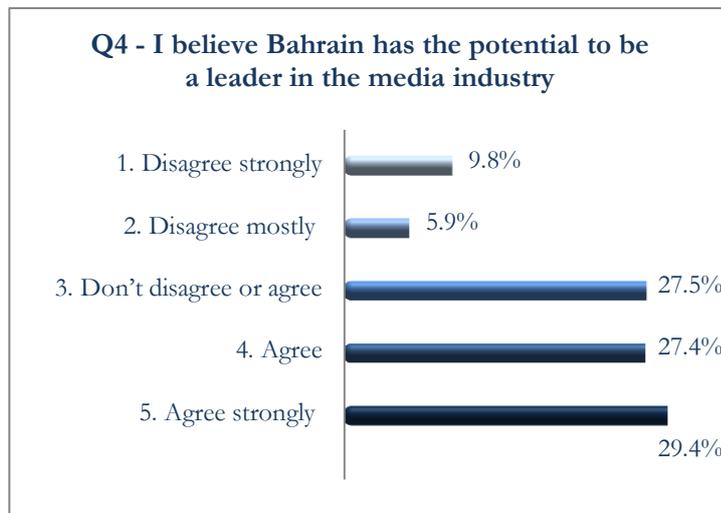


The results show that:

- Approximately two third of the respondents, of which of **45.1** percent **disagree strongly** and **23.5** percent **disagree mostly** that Bahrain is a leader in the media industry. These respondents have the impression that improvements could be made in its positioning as a global player in the media industry;

- 21.6** percent have a mitigated view on Bahrain being a leader at the moment;
- Only **9.8** percent believe that Bahrain is a leader in the industry.

**Question 4 – I believe Bahrain has the potential to be a leader in the media industry**

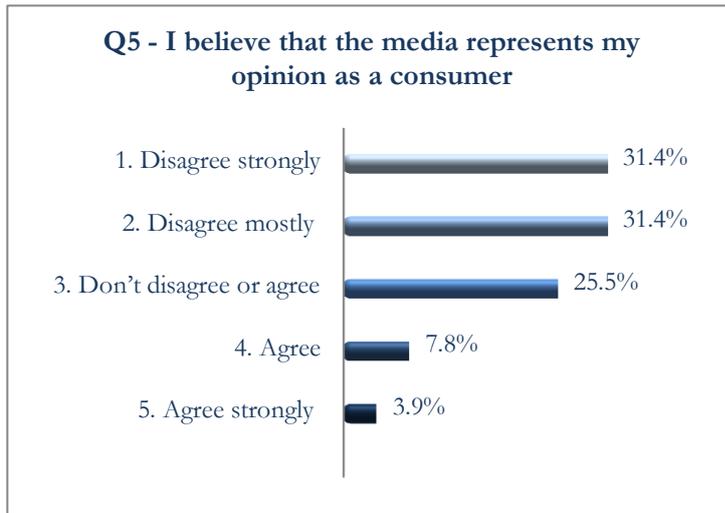


The results demonstrate that:

- 29.4** percent, a third of the respondents agree strongly that **Bahrain has the potential to become one of the leaders** in the media industry, followed by **27.4 percent** which reinforce this affirmation. **More than half of the respondents** have a **positive** believe of the **future of Bahrain media industry**;

- 27.5** percent neither agree or disagree with Bahrain’s potential in the media industry;
- A total of **15.7** percent **disagree** to Bahrain having the potential to become a leader in the industry

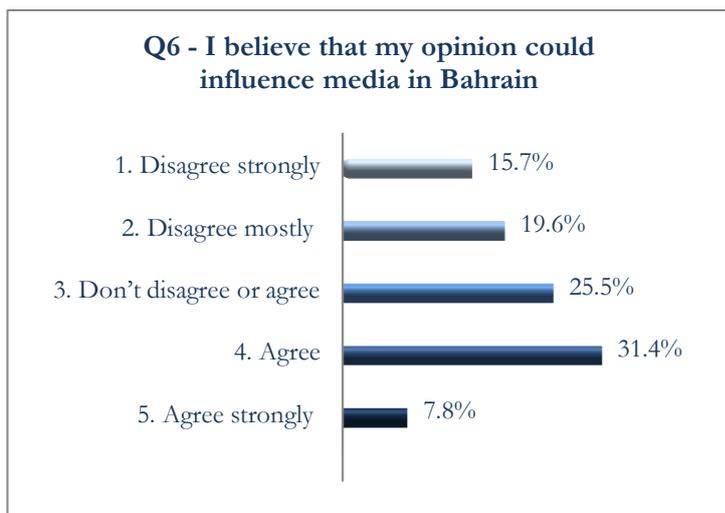
### Question 5: I believe that the media represents my opinion as a consumer



The outcome shows that:

- Nearly a **third** of the respondents, equal to **31.4 percent disagree strongly** that their view point as consumer **is not represented**;
- **31.4** percent of the population of respondents **disagree** that **their opinion is not represented as consumers**;
- **25.5** percent have a mitigated opinion on the fact that their opinion is represented;
- For the remaining **11.7** percent of the respondents, their consumer's **opinion is well represented** in the Kingdom.

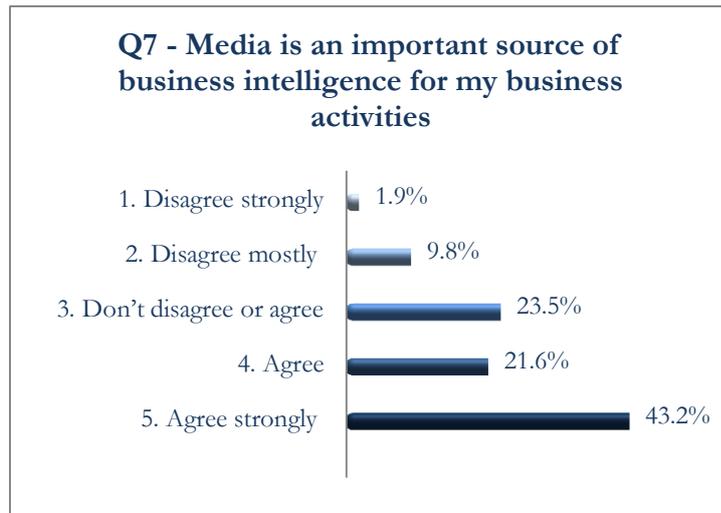
### Question 6: I believe that my opinion could influence media in Bahrain



The results demonstrate that:

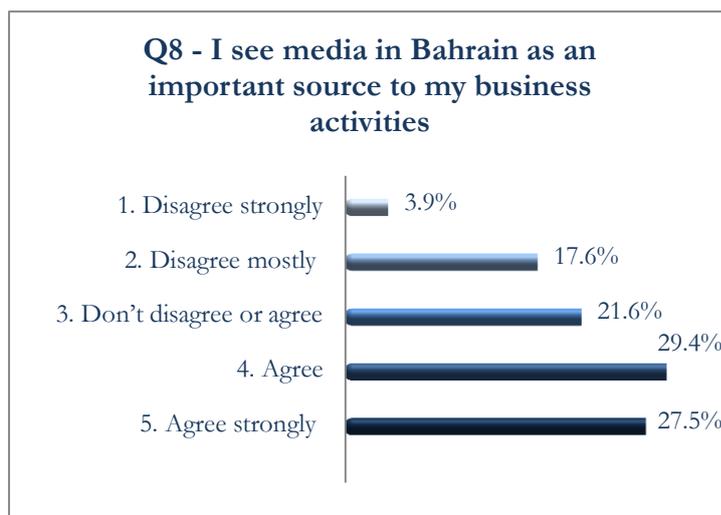
- **15.7** percent and **19.6** percent of the respondents disagree that their opinion could influence media in Bahrain;
- **25.5** percent are moderated that their opinion could influence media;
- **More than a third, 31.4** percent of the respondents **are confident** that their view point could influence the sector; and **7.8** percent **strongly** believe that **their views could impact the media** in the kingdom.

Question 7: Media is an important source of business intelligence for my business activities



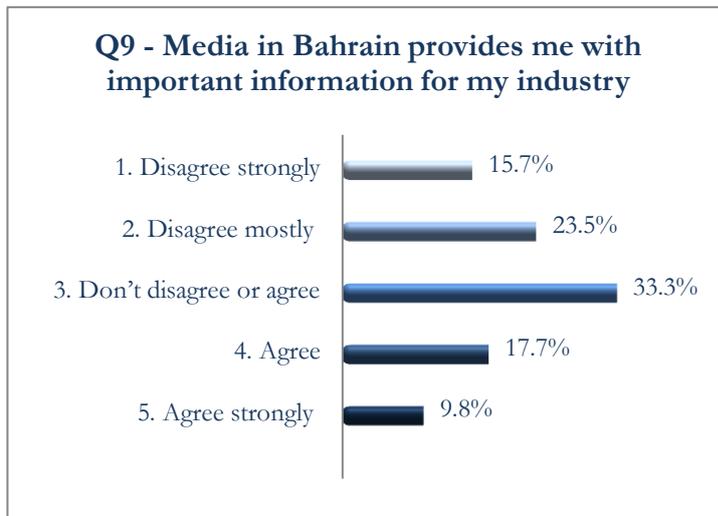
- In Bahrain, approximately **two third** of the accumulated population of respondents **43.2** percent, and **21.6** percent **agree** that media is **key to source** their **business intelligence** for their professional activities;
  - **23.5** percent of the respondents are neutral towards this demand, with no strong positive or negative impact on their business intelligence for their professional activities;
- And **11.7** percent **disagree** that media **contributes** as an important source of business intelligence for their business.

Question 8: I see media in Bahrain as an important source to my business activities



- The outcome shows that:
- **More than half** of the respondents agree **56.9** percent agree and strongly agree that media in Bahrain is an **important source to their business activities**;
    - **21.6** percent have a moderate view towards the statement;
  - And **21.5** percent find that media in Bahrain is not important for their business.

Question 9 – Media in Bahrain provides me with important information for my industry



- For **39.2 percent** of respondents, media in Bahrain **doesn't provide** important source of **information** in their respective industries;

- 33.3 percent** of respondents have a moderated view of the media in the kingdom; which still provides them with information to their industry segments;

- 27.5 percent** of the respondents agree that the **media** in the kingdom gives **essential information** for their **industries**.

Question 10: I believe data is important to the performance of my business



- A very strong **57 percent** of the respondents believe that **data is crucial** to the **performance of their business**;

**Additionally 33.3 percent** of the population of respondents **measure data as important** to the performance of their professional activities;

- 3.9 %** don't agree that there is a need of data to their business performance.

## Recommendations:

In transitioning to a knowledge-based economy, the role of access to key information and data is critical to identifying and exploiting new opportunities among Bahraini businesses, operating both within and outside of the media industry.

For media channels to evolve to act as a driver for growth among Bahraini businesses, consumers and attract investment to this sector, we recommend the following strategic thrusts:

- The transformation of media towards analytics and big data, enabling the public and private sector to develop a repository of knowledge and information that drives business productivity and competitiveness;
- Develop traditional and social media analytics and big data to expand the competitiveness of the media value chain in the Kingdom of Bahrain and drive the emergence of new businesses and start-ups serving specific segments;
- Support the formation of key linkages within the soon-to-be-established Bahraini media cluster, and encourage the availability of market-relevant information across complimentary sectors to enhance their efficiency and attract investment;

Media is a transformation source of information to the public and private sectors, leading to positive evolution for the national and regional economic strategy, giving the tools to local businesses to grow, gain market share, encourage foreign investment for the kingdom which will benefit on all levels.

With this national and regional economic strategy, it will result of decreasing intensity of competitions and avoid falling behind in leadership and innovation and help achieve growth.

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