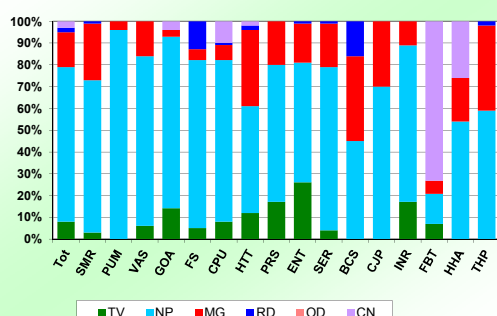


# BAHRAIN - 2013

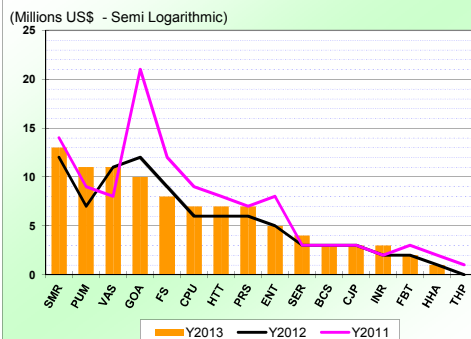
Millions US\$ 95 ▲ + 6%

| Chapter                                 | Abbreviation | Y2011      | Y2012     | Y2013     | Sh%        | Y13/12   | Media Split % |           |           |          |          |          |
|-----------------------------------------|--------------|------------|-----------|-----------|------------|----------|---------------|-----------|-----------|----------|----------|----------|
|                                         |              |            |           |           |            |          | TV            | NP        | MG        | RD       | OD       | CN       |
| Shopping Malls & Retail Stores          | SMR          | 14         | 12        | 13        | 14         | 8        | 3             | 70        | 26        | 1        | 0        | 0        |
| Publishing Media                        | PUM          | 9          | 7         | 11        | 12         | 57       | 0             | 96        | 4         | 0        | 0        | 0        |
| Vehicles Accessories & Supply           | VAS          | 8          | 11        | 11        | 12         | 0        | 6             | 78        | 16        | 0        | 0        | 0        |
| Government/Corporate & Organization Ad  | GOA          | 21         | 12        | 10        | 11         | -17      | 14            | 78        | 3         | 0        | 0        | 4        |
| Financial Services                      | FS           | 12         | 9         | 8         | 8          | -11      | 5             | 78        | 5         | 13       | 0        | 0        |
| Communications & Public Utilities       | CPU          | 9          | 6         | 7         | 7          | 17       | 8             | 75        | 7         | 1        | 0        | 10       |
| Hotel Travel & Tourism                  | HTT          | 8          | 6         | 7         | 7          | 17       | 12            | 49        | 35        | 2        | 0        | 2        |
| Professional Services                   | PRS          | 7          | 6         | 7         | 7          | 17       | 17            | 63        | 20        | 0        | 0        | 0        |
| Entertainment                           | ENT          | 8          | 5         | 5         | 5          | 0        | 26            | 55        | 18        | 1        | 0        | 0        |
| Other Services                          | SER          | 3          | 3         | 4         | 4          | 33       | 4             | 75        | 20        | 1        | 0        | 0        |
| Business/Construct Equip. & Supply      | BCS          | 3          | 3         | 3         | 3          | 0        | 0             | 45        | 39        | 16       | 0        | 0        |
| Clothing Jewellery & Personal Accs      | CJP          | 3          | 3         | 3         | 3          | 0        | 0             | 70        | 30        | 0        | 0        | 0        |
| Insurance & Real Estate & Properties    | INR          | 2          | 2         | 3         | 3          | 50       | 17            | 72        | 11        | 0        | 0        | 0        |
| Food Beverages And Tobacco              | FBT          | 3          | 2         | 2         | 2          | 0        | 7             | 14        | 6         | 0        | 0        | 74       |
| Household Appliances                    | HHA          | 2          | 1         | 1         | 1          | 0        | 0             | 54        | 20        | 0        | 0        | 26       |
| Toiletries Hygiene/ House Care Products | THP          | 1          | 0         | 0         | 0          | #DIV/0!  | 0             | 59        | 39        | 2        | 0        | 0        |
| <b>Total</b>                            |              | <b>112</b> | <b>90</b> | <b>95</b> | <b>100</b> | <b>6</b> | <b>8</b>      | <b>71</b> | <b>16</b> | <b>2</b> | <b>0</b> | <b>3</b> |

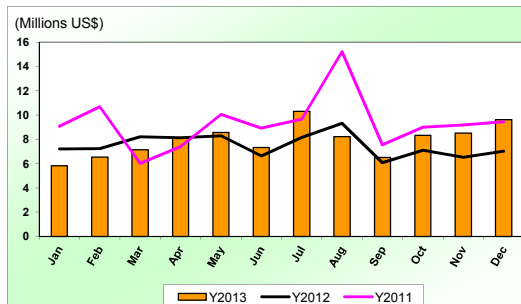
Y2013 Media Split %



Annual Growth Y2011 - Y2013



## Monthly Spend Analysis (Millions US\$)Y2011 - 2013



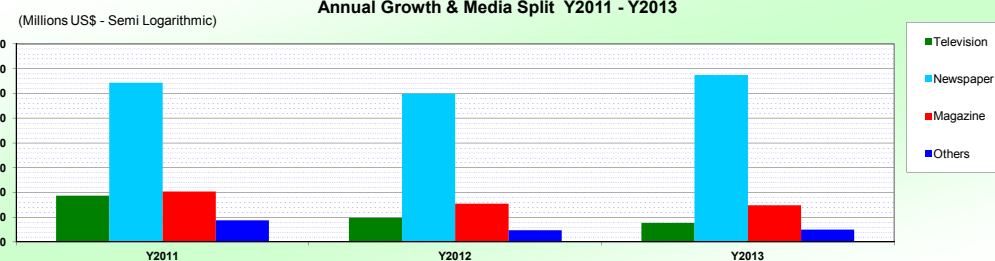
| Period       | Y2011      | Y2012     | Y2013     | Var'n % Y13/12 |
|--------------|------------|-----------|-----------|----------------|
| Jan          | 9          | 7         | 6         | -19            |
| Feb          | 11         | 7         | 7         | -10            |
| Mar          | 6          | 8         | 7         | -13            |
| Apr          | 7          | 8         | 8         | 0              |
| May          | 10         | 8         | 9         | 3              |
| Jun          | 9          | 7         | 7         | 11             |
| Jul          | 10         | 8         | 10        | 26             |
| Aug          | 15         | 9         | 8         | -12            |
| Sep          | 8          | 6         | 6         | 7              |
| Oct          | 9          | 7         | 8         | 17             |
| Nov          | 9          | 7         | 9         | 30             |
| Dec          | 9          | 7         | 10        | 37             |
| <b>Total</b> | <b>112</b> | <b>90</b> | <b>95</b> | <b>6</b>       |

## Overall Media Split Analysis (Millions US\$)

| Media        | Y2011      |            | Y2012     |            | Y2013     |            | Var'n %    |           | Growth Index* |  |
|--------------|------------|------------|-----------|------------|-----------|------------|------------|-----------|---------------|--|
|              | Value      | Sh%        | Value     | Sh%        | Value     | Sh%        | Y2012/2013 | Y13       | Y12           |  |
| Television   | 19         | 17         | 10        | 11         | 8         | 8          | -21        | 41        | 52            |  |
| Newspaper    | 64         | 57         | 60        | 67         | 68        | 71         | 13         | 105       | 93            |  |
| Magazine     | 20         | 18         | 15        | 17         | 15        | 16         | -4         | 73        | 76            |  |
| Others       | 9          | 8          | 5         | 5          | 5         | 5          | 7          | 58        | 54            |  |
| <b>Total</b> | <b>112</b> | <b>100</b> | <b>90</b> | <b>100</b> | <b>95</b> | <b>100</b> | <b>6</b>   | <b>85</b> | <b>80</b>     |  |

\*Index base Y2011

Annual Growth & Media Split Y2011 - Y2013



## Top Brands Y2013 (000 US\$)

### Television Top Spenders

| Rank | Brand             | Y2013 | Y13/12 | %Var'n |
|------|-------------------|-------|--------|--------|
| 1    | Group Plus        | 1,205 | N      |        |
| 2    | Bahrain Summer    | 943   | E      |        |
| 3    | Nat'l Inst.f.huma | 500   | N      |        |
| 4    | Viva              | 499   | 256    |        |
| 5    | Al Dair Gardens   | 495   | N      |        |
| 6    | Coral Bay         | 370   | N      |        |
| 7    | Camelot           | 320   | N      |        |
| 8    | Montreal Car C.   | 277   | -13    |        |
| 9    | Bmi Bank          | 207   | 89     |        |
| 10   | Bah.int'l Circuit | 198   | 0      |        |
| 11   | Muharrag Mun.bah  | 197   | N      |        |
| 12   | Exotic Cars       | 183   | -30    |        |

### Newspapers Top Spenders

| Rank | Brand            | Y2013 | Y13/12 | %Var'n |
|------|------------------|-------|--------|--------|
| 1    | Dana Cinema      | 3,432 | 38     |        |
| 2    | Viva             | 2,302 | 69     |        |
| 3    | Cineco 20        | 2,186 | E      |        |
| 4    | Cc_seef_s_j_awal | 2,062 | -36    |        |
| 5    | Zain Tel.comm.   | 1,870 | -16    |        |
| 6    | Montreal Car C.  | 1,119 | 41     |        |
| 7    | Lulu             | 1,117 | -15    |        |
| 8    | Batelco          | 878   | -1     |        |
| 9    | Star Real Estate | 733   | 55     |        |
| 10   | Jobs4bahrain     | 640   | E      |        |
| 11   | Samsung          | 628   | 63     |        |
| 12   | Toyota           | 615   | 116    |        |

### Magazines Top Spenders

| Rank | Brand             | Y2013 | Y13/12 | %Var'n |
|------|-------------------|-------|--------|--------|
| 1    | Viva              | 261   | 77     |        |
| 2    | Al Zain Jewellery | 132   | E      |        |
| 3    | Bah.int'l Circuit | 132   | -33    |        |
| 4    | Toyota            | 121   | 28     |        |
| 5    | Elite             | 117   | 12     |        |
| 6    | Batelco           | 114   | 33     |        |
| 7    | Nissan            | 106   | 7      |        |
| 8    | Porsche           | 101   | -18    |        |
| 9    | Qanbar Dywidag    | 97    | 24     |        |
| 10   | The Big 5         | 93    | E      |        |
| 11   | Auto Max          | 92    | E      |        |
| 12   | Gap               | 91    | 36     |        |

### Radio Top Spenders

| Rank | Brand             | Y2013 | Y13/12 | %Var'n |
|------|-------------------|-------|--------|--------|
| 1    | Al Salam Bank     | 990   | 96     |        |
| 2    | Gulf Comp.serv.   | 449   | 12     |        |
| 3    | Bah.special.hosp  | 31    | N      |        |
| 4    | Viva              | 20    | -41    |        |
| 5    | Nonoo Exchange    | 19    | 144    |        |
| 6    | Emirates Airlines | 16    | E      |        |
| 7    | Bah.int'l Circuit | 16    | 78     |        |
| 8    | Coral Bay         | 15    | N      |        |
| 9    | Sharaf            | 14    | E      |        |
| 10   | Signature         | 14    | 61     |        |
| 11   | Gulf Hotel        | 13    | E      |        |
| 12   | Batelco           | 13    | E      |        |

E - Exceeding the limit >300% N - New