



Ipsos Connect

CONTENTPLUS
define | design | deliver

UAE PR index

1st EDITION

2017



Ipsos Connect

CONTENTPLUS
define | design | deliver

UAE PR index

1st EDITION

2017

Al Thuraya Tower 1, 8th Floor, Dubai Media City,
Dubai, U.A.E.
Tel; +971 4 4408 980
e.mail: info@ipsos.com
web; www.ipsos.com

1- D-OFF-105 | DTEC | DSOA
P.O. Box: 342062, Dubai, U.A.E
Tel; +971 4 39 65 090
e.mail: info@content-plus.net
web; www.content-plus.net

SUMMARY	04
Research Methodology	06
Journalists' media type	08
Editorial Field	14
TOP PR AGENCIES (MAIN INDEX)	18
TOP PR AGENCIES in terms of media content quality (Sub Index 1)	24
TOP PR AGENCIES in terms of support, fast follow up and interaction (Sub Index 2)	28
Most Active PR Agencies	32
Work Preference And Evaluation	38
WEAKNESSES of PR Agencies	44



The 'UAE PR Index 2017' was launched on the premise that PR agencies connect their clients with various stakeholders via numerous channels, with the media being the primary channel through which communication with audiences is achieved. Given the large number of PR agencies in the UAE, the UAE PR Index 2017 seeks to examine the efficacy of these agencies based on the first-hand experiences of journalists who work with them.

Although the functions of PR agencies have expanded and branched into various channels, media relations continue to capture the lion's share of customer interest. Businesses and organisations in the region still choose to deliver strategic corporate messages primarily through traditional and digital media. These are considered the most important platforms for conveying news and corporate messages to target audiences. This highlights the importance of the UAE PR Index 2017, which assesses the reputation of PR companies and their relations with journalists in the mainstream media, which reflects their ability to communicate their clients' content through the media.

By launching the UAE PR Index 2017, Content Plus aims to analyse the strengths and weaknesses of the UAE PR industry based on journalists' perspectives and pinpoint practical ways to improve PR agencies' level of collaboration with various media outlets.

The UAE'S first ever v comprises a poll of 200 journalists on their perspectives of PR agencies and PR professionals operating in the UAE. The PR Index identifies the top 10 PR agencies based on two key criteria (2 sub-indices):

- **Sub-index 1:** media content quality.
- **Sub-index 2:** level of support, fast follow up and interaction

The UAE PR Index 2017 also reveals the most active PR agencies in the UAE as a separate index.

The PR Index seeks to fill the gap where a lack of evaluation of PR agencies operating in the UAE exists in terms of the quality of content and media relations performance. The evaluation emanates from the perspective of journalists, in response to the PR sector's intense activity, the large number of companies operating within this realm and the absence of true criteria to measure their performance. These factors are essential in aiding businesses to select the best and most suitable PR companies for their needs. It is for these reasons that Content Plus conducted a direct survey with representatives of media outlets operating in the country, to identify a list of the most active and communicative PR agencies on the ground.

The PR Index is a practical guide that enables organisations seeking to strengthen their presence in the media and to identify the best PR agencies who can achieve this goal effectively, through perspectives of journalists. By utilising the PR Index, institutions can adopt new mechanisms in contracting with PR agencies by monitoring and evaluating their performance as evident in the PR Index. This, in turn, serves to enhance the efficiency of expenditure and return on investment.



▶ 200 interviews



▶ Representing journalists who work in the UAE



▶ Well structured Arabic and English questionnaires Interviews were conducted in English and Arabic



▶ From April 2-24, 2017

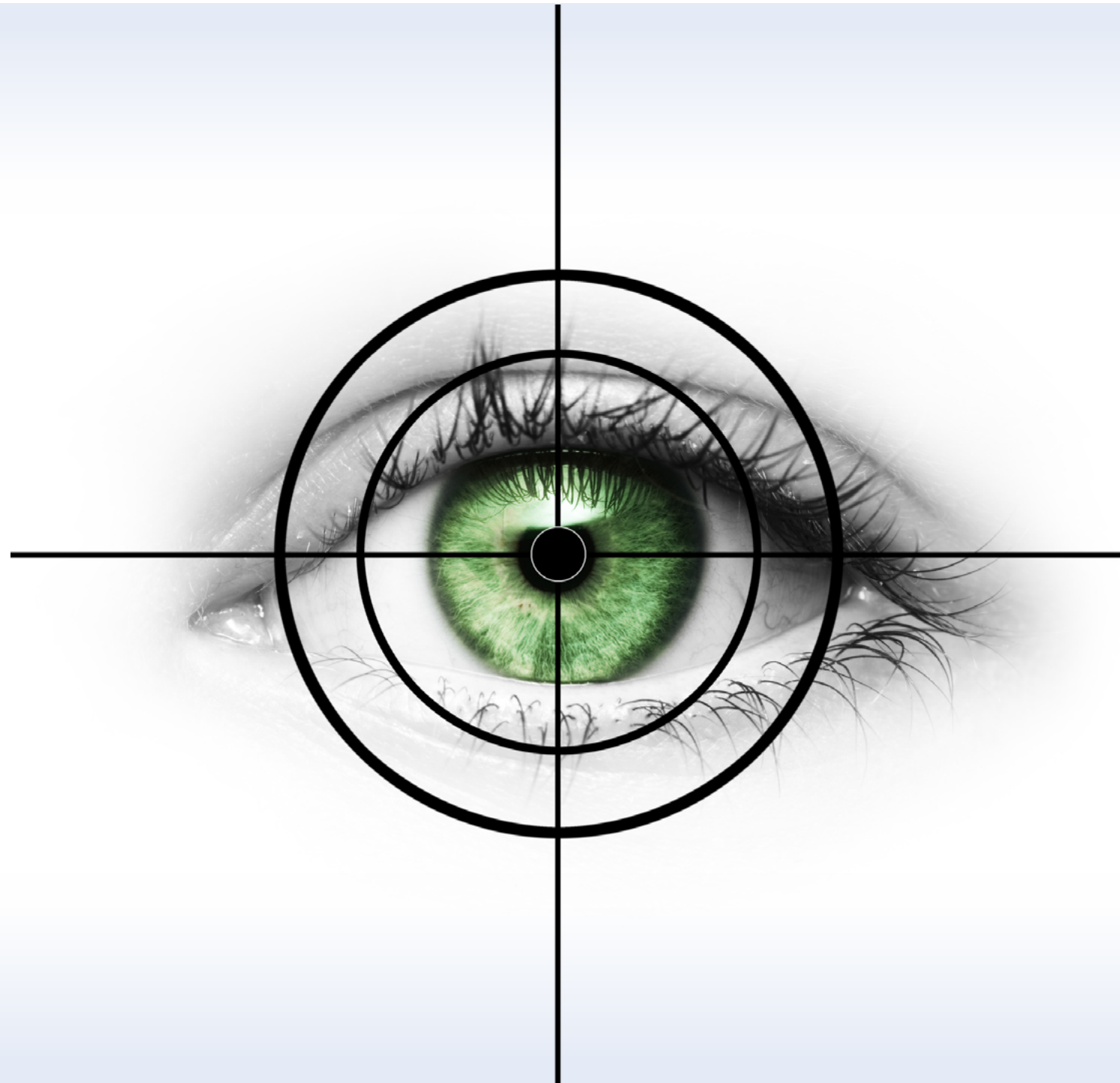


▶ CATI methodology (Computer Assisted Telephonic Interview)



▶ Length of the survey is up to 8 minutes





With the phenomenal rise of the internet and subsequent increase in the number of web-sites; nowadays, the media field is going more into digital than traditional print. This trend was highlighted as well in the fifth edition of the 'Arab Media Outlook: Youth.

Content. Digital media' issued by Dubai Press Club (DPC) in cooperation with Dubai Media City (DMC).

Fuelled by internet penetration rates in the MENA region, digital media is the fastest growing segment in the region, with a 17% CAGR for the period 2014- 2018 according to the outlook.

Newspapers in the UAE are primarily read at home, but are at significant risk of losing subscribers. About 22% of the UAE's newspaper readers read the periodicals at work, while 48% read newspapers at home. While the print medium has taken a hit, the content which it houses still holds power. News consumption is shifting from a pull to a push model on social media feeds and mobile apps. Make no mistake. What's changing is the tangible medium, i.e. the physical paper content is printed on and the distribution channel - the local newsstand, but with regard to the appetite for news, the role of newspapers as a 'content supplier' remains albeit online.

Readers have consistently turned online (46%) to search engines to sift through and increasingly social media for community curated news. The print media market continues to lose share to other media such as digital and TV. While printed newspapers are facing turbulence caused by digitisation itself, they have newer challenges from competing media sources – TV, websites, and social media – with the readership skewed by youth demographics.

TV still rules the roost as the mass medium of choice, for accuracy, reliability and breaking news. The closest challenger is online news portals (some operated by the print newspapers themselves) and native digital news players. It's hence no surprise that print is unable to compete as news has become real-time.

Newspapers still retain a 24-hour latency due to their traditional printing and distribution cycle.

The print magazine market in the UAE is significant, and most magazines are bi-lingual, i.e. Arabic and English languages. While many of the magazines contain local content and publish locally, a few are also licensed

reprints of international editions. Today, over 150 magazines are published in the UAE covering a wide range of sectors, genres and categories, such as entertainment, technology, business, fashion, travel, lifestyle, home, design, medical, auto, and much more.

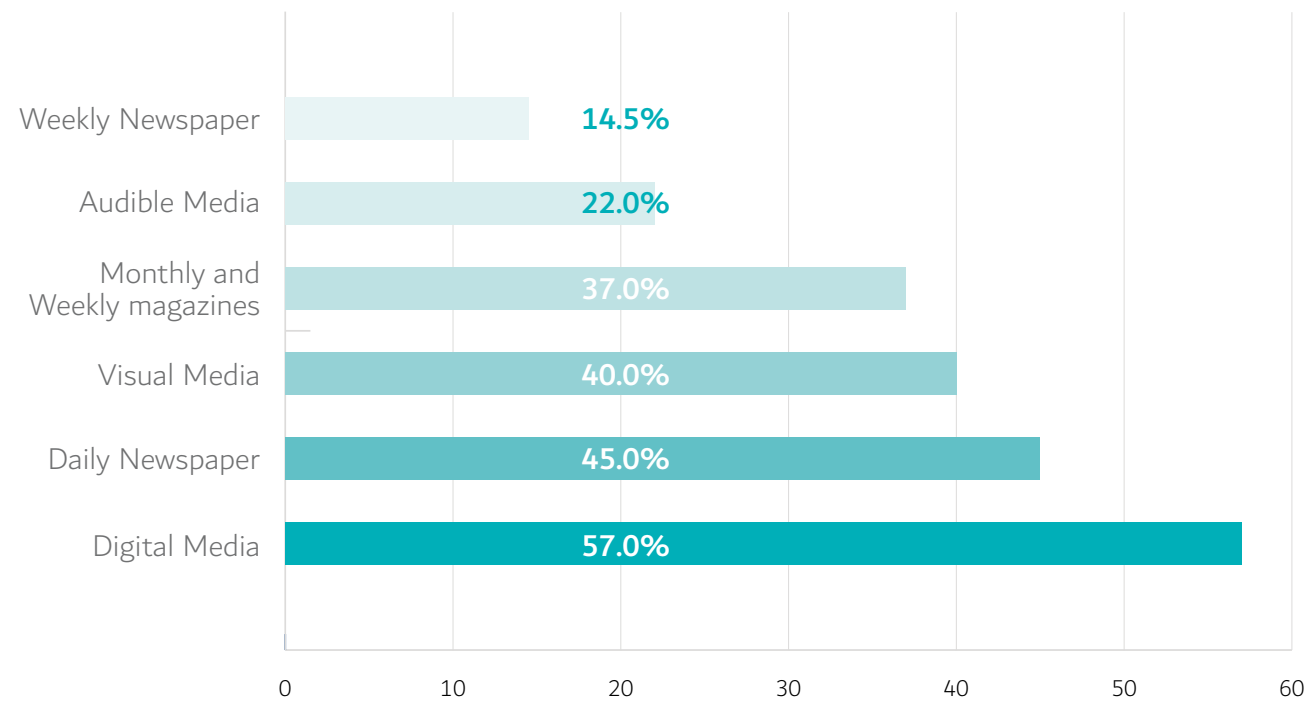
Weekly magazine supplements which are distributed free with newspapers, continue to claim the largest readership.

The UAE is now headquarters to more than 72 free-to-air (FTA) TV channels, slightly behind Egypt and Saudi Arabia in the Arab world. The UAE also has 16 terrestrial channels, of which, 13 are state-owned.

The majority of UAE radio listeners, listen to radio channels in their car, due to ease of access, no cost of consumption to consumers and increase in commuting time. With over 40 radio stations, the UAE has the largest radio market throughout the whole of the MENA region. Of these 40 radio stations, 14 stations are in Arabic and the rest are spread across English, Hindi, Tamil, Tagalog, Malayalam, Russian, Persian and Urdu languages.

► Journalist's Media Type – Total

With the invasion of the internet and the increase in the number of websites; nowadays the media industry is going more into digital.

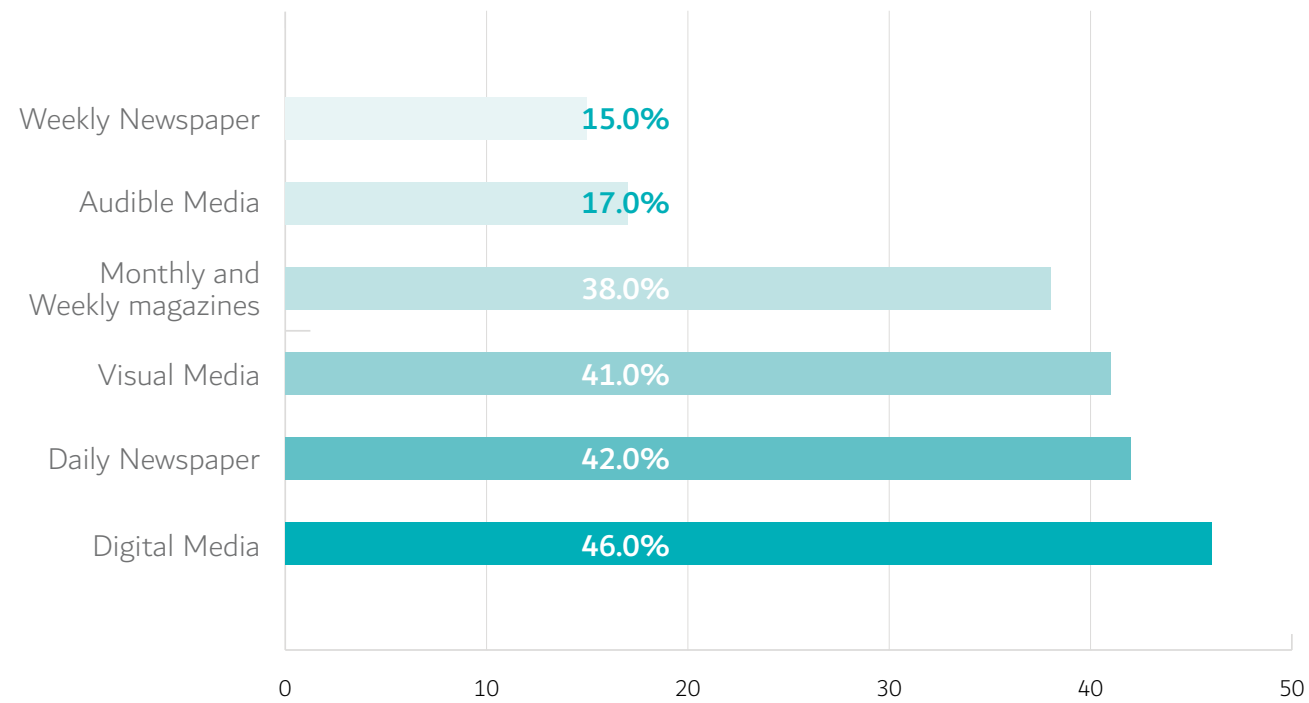


Sample Size: 200 Respondents



► Journalist's Media Type – Arabic Editors

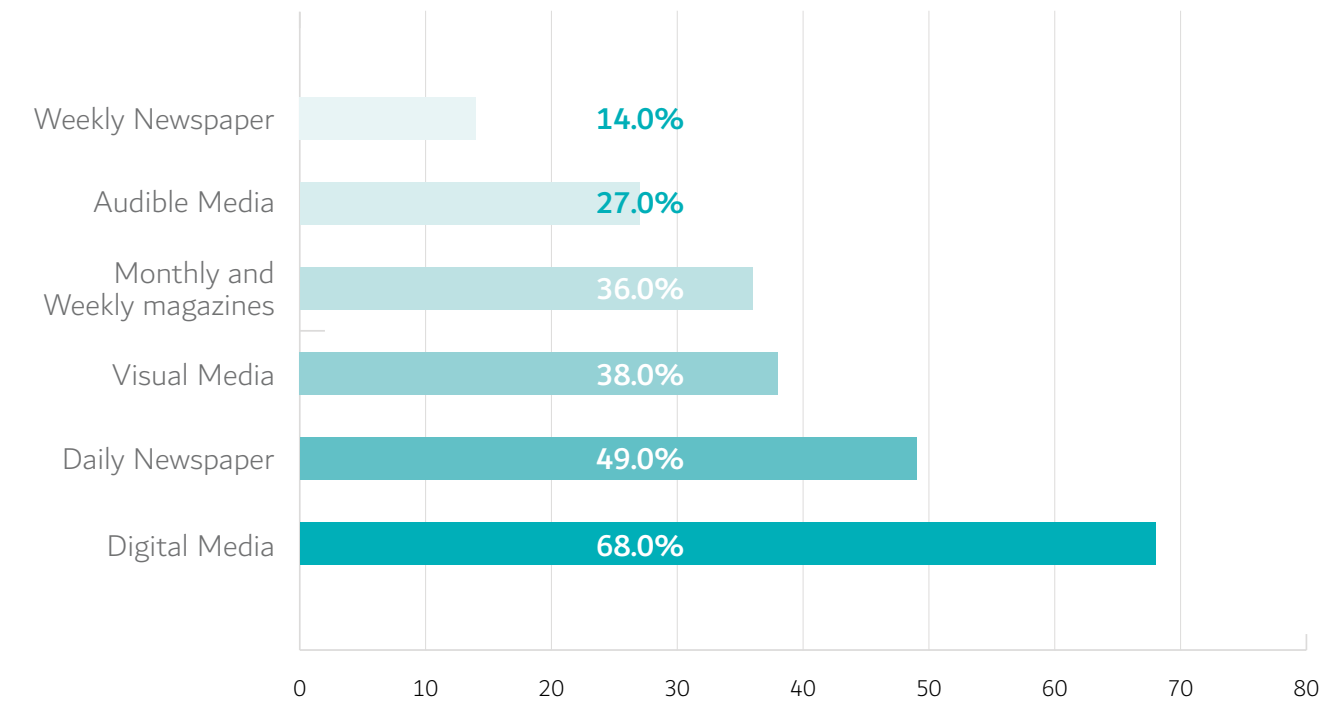
46% of Arabic editors write content online, versus 41% writing in traditional daily newspapers. 42% of them also write for visual media, like TV. This can be due to the big number of TV channels in the region requiring content.



Sample Size: 100 Respondents

► Journalist's Media Type – English Editors

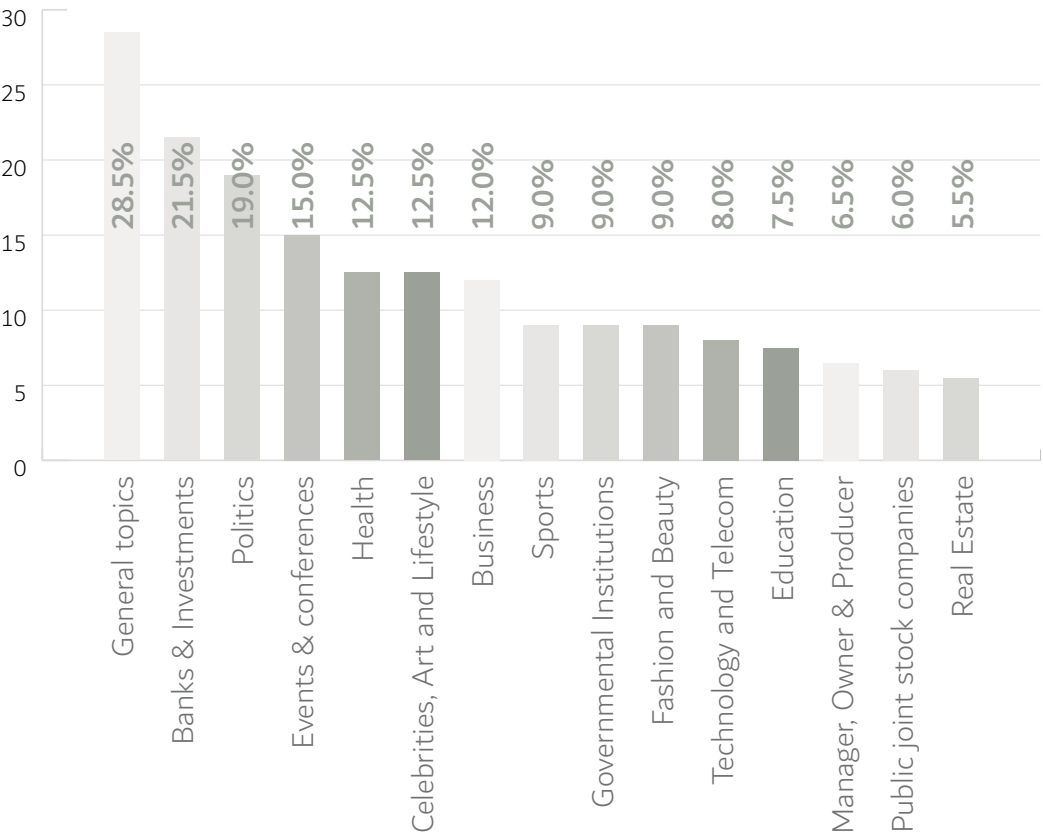
With a huge difference from Arabic editors, 68% of English editors write content online compared to 49% writing for daily traditional newspaper. This scenario is related to the number of English newspapers in the UAE and the rest of the MENA region versus the high number and easy accessibility of English websites.



Sample Size: 100 Respondents

► Editorial Field- General – General

Journalists' editorial field reflects the UAE's vital sectors, particularly, the banking and investment sector, as shown by the latest journalist specialisation statistics in terms of sectors covered. General topics account for the largest proportion of journalists' work in the media field. This comes in light of the trend towards a comprehensive press model that can cover the largest number of topics and sectors, as is required by modern digital media.

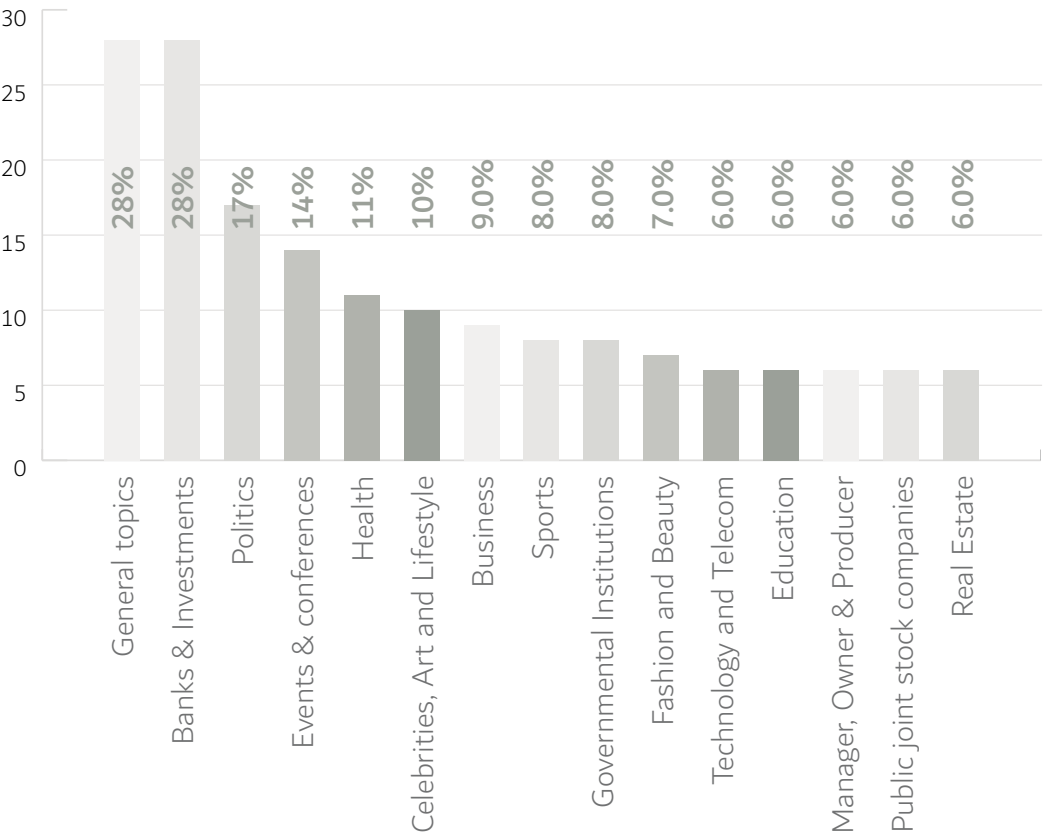


Sample Size: 200 Respondents



► Editorial Field- General – Arabic Editors

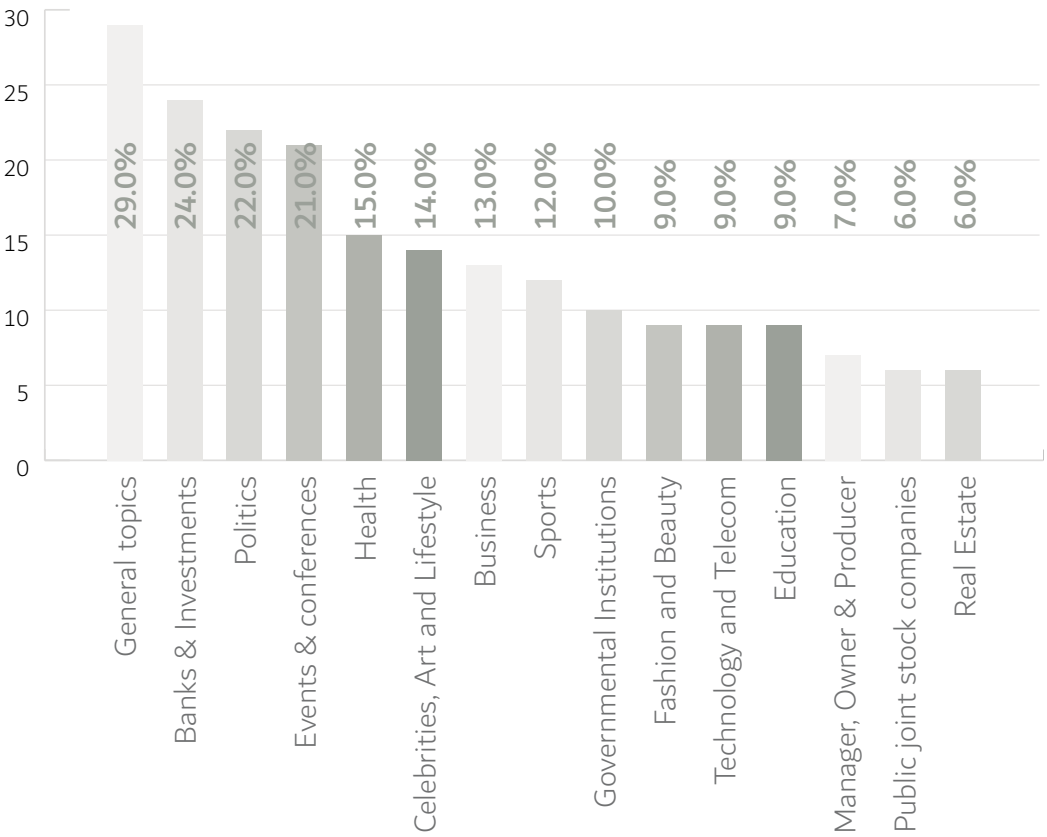
Journalists' editorial field reflects the UAE's vital sectors, particularly, the banking and investment sector, as shown by the latest journalist specialisation statistics in terms of sectors covered. General topics account for the largest proportion of journalists' work in the media field. This comes in light of the trend towards a comprehensive press model that can cover the largest number of topics and sectors, as is required by modern digital media.



Sample Size: 100 Respondents

► Editorial Field- General – English Editors

The majority of English-speaking journalists specialise in general topics, with politics coming in second place. This may be due to the focus on regional and international issues, especially those related to foreign countries whose nationals reside in the UAE. The business sector came in third place, indicating the importance of business news in the English media in the UAE.



Sample Size: 100 Respondents



The Top PR Agencies Combined Index is based on the overall results of two sub-indices and is based on the opinions of journalists working in both Arabic and English media. Sub index 1 defines the top PR agencies in terms of media content quality in line with the opinions expressed in the poll, which asked journalists the following multiple-choice question:

“Which is the best public relations agency when it comes to the quality of the media content?”

In response, journalists mentioned the names of PR companies that offer the best media content, including press releases and answers to media questions and others.

Sub index 2 identified the top PR agencies in terms of support, fast follow-up and interaction with journalists, based on journalists' responses to the following question:

“Which is the best public relations agency, when it comes to the quality of support, fast-follow up and interaction provided?”

Journalists provided their answers to the question, mentioning the names of PR companies with the best levels of support, follow-up and interaction.

Two companies topped the list of journalists' choices in the main index and sub-indices, including among the choices of Arab journalists and their counterparts in English-speaking media, with ASDAA Burson-Marsteller ranking first. APCO ranked second in the main index and sub-indices.

The UAE PR Index 2017 shows growing competition between local PR companies and their international counterparts, with journalists' choices in various indicators and standards being distributed by 50% between local and international PR agencies. This reflects the success achieved by

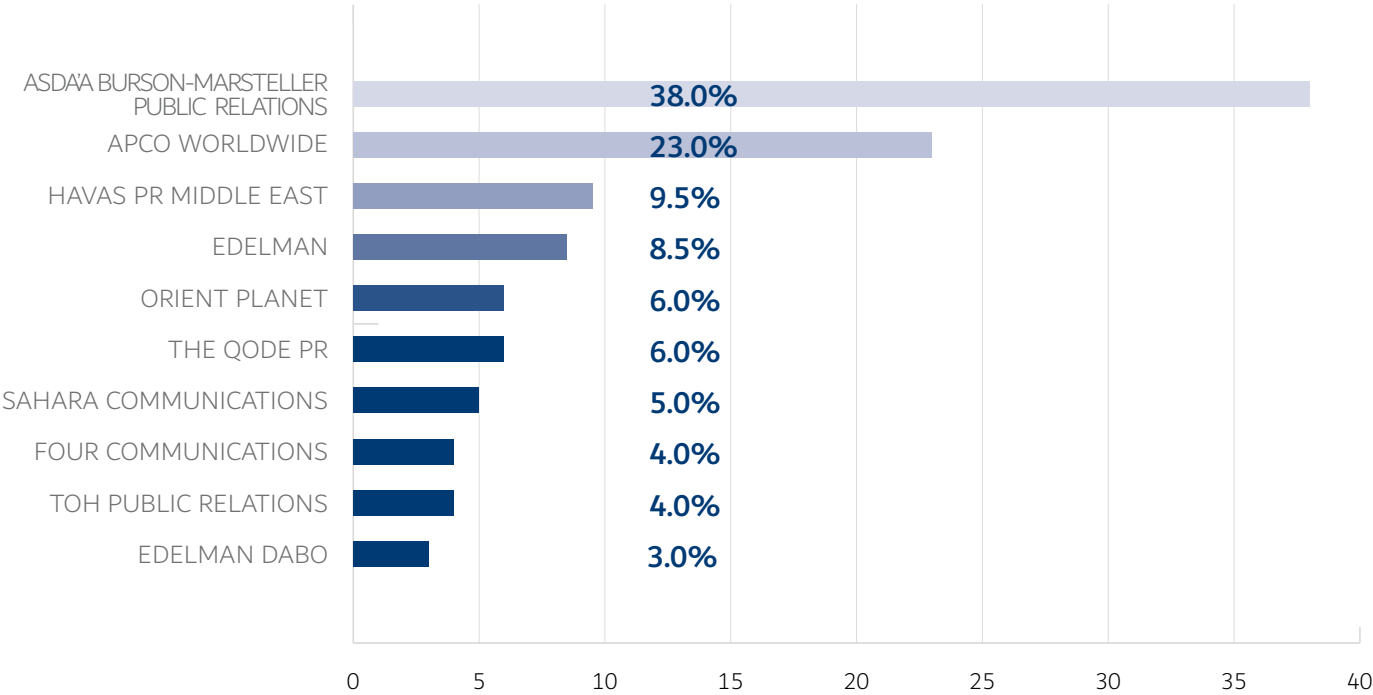
the various categories of companies that have launched from within the UAE, whether they are large or small, in building a solid reputation in the media field and acquiring a significant share of the public relations market at the local level.

These companies have recognized the importance of relying on qualified cadres who possess extensive professional experience, an in-depth understanding of the mechanisms and requirements of media work in the UAE on the one hand, as well as comprehending clients' objectives from private companies to government institutions, on the other hand.

The PR Index also highlights the need to pay attention to the quality of the content provided by the PR agencies on behalf of their customers in tandem with developing mechanisms to communicate with the media to deliver the required messages to target audiences. This is especially true, in light of the complexity of the functions that PR companies offer and the increasing reliance on the content provided by them, in the local media.

The PR Index also highlights the choices of journalists working in Arabic-speaking media and their English-speaking counterparts independently, showing disparities in journalists' choices when it comes to the best PR agencies across various criteria.

► Top PR Agencies (Combined)

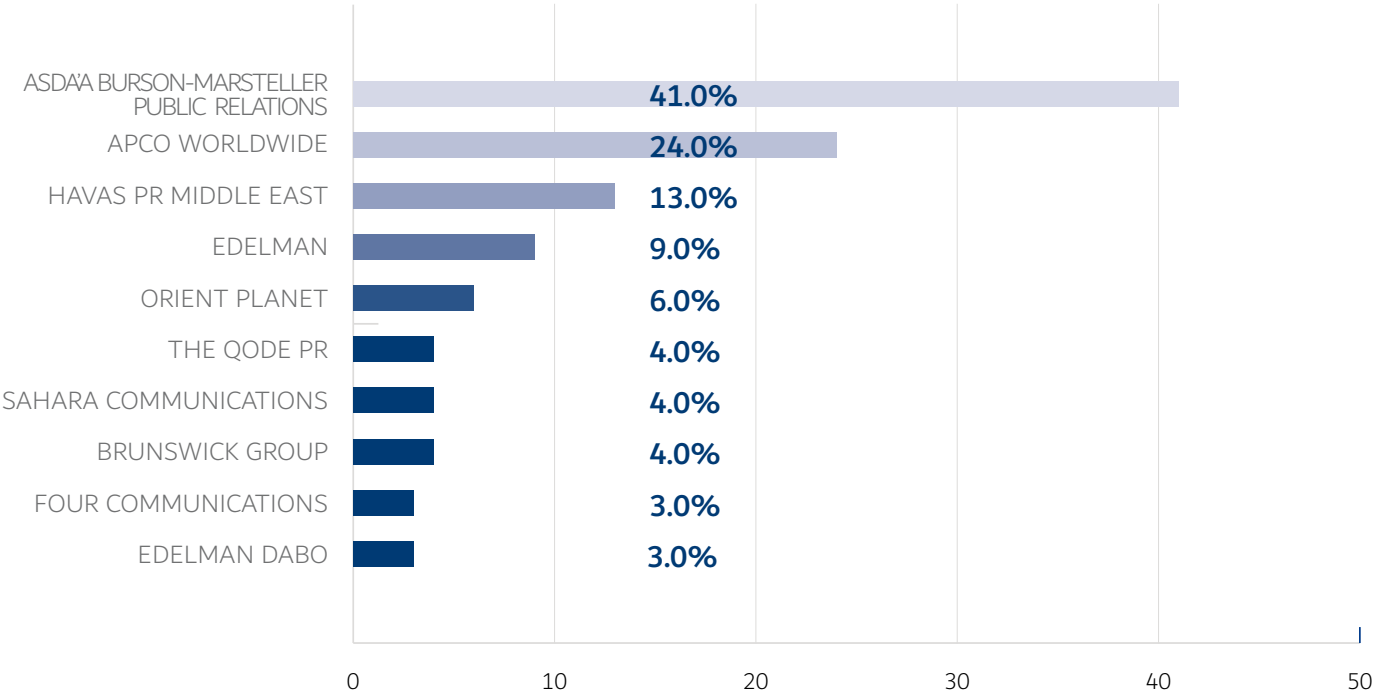


Sample Size: 200 Respondents

Combined: Top in terms of Media Content Quality, support, fast follow up and interaction



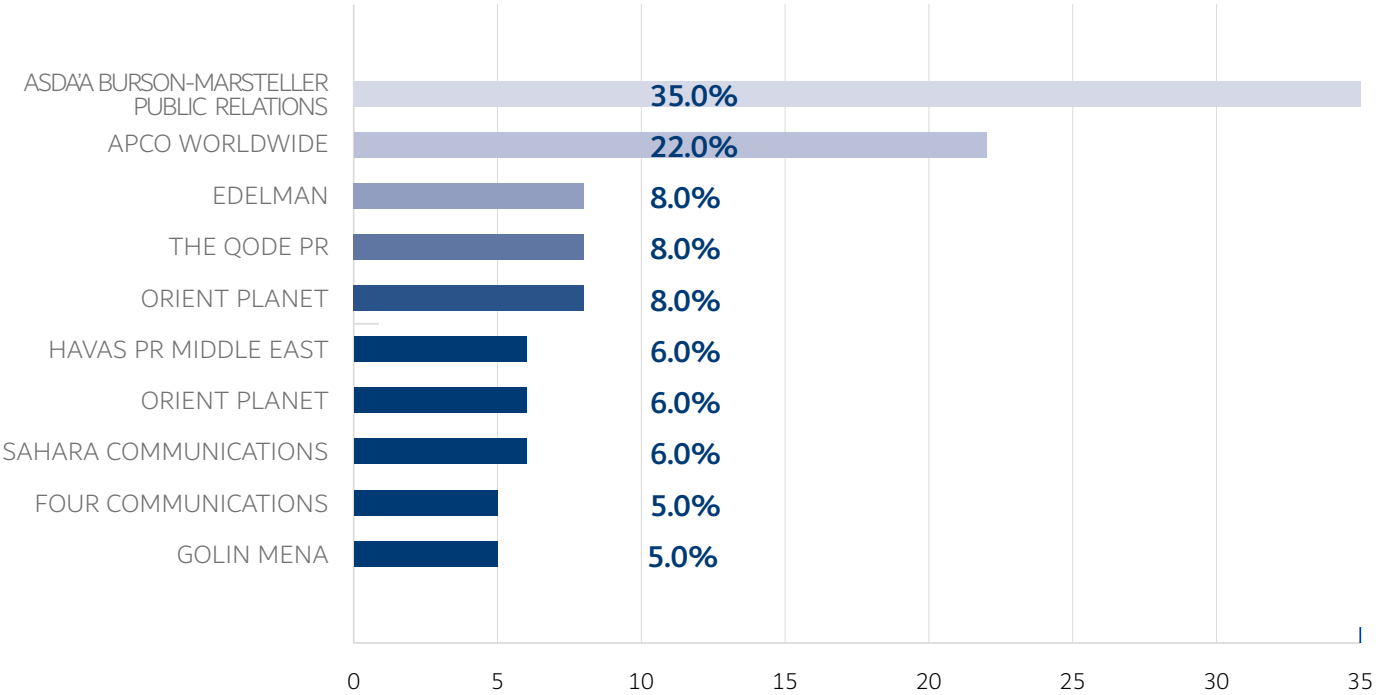
▶ Top PR Agencies (Combined) – Arabic Editors



Sample Size: 100 Respondents

Combined: Top in terms of Media Content Quality, support, fast follow up and interaction

▶ Top PR Agencies (Combined) – English Editors



Sample Size: 100 Respondents

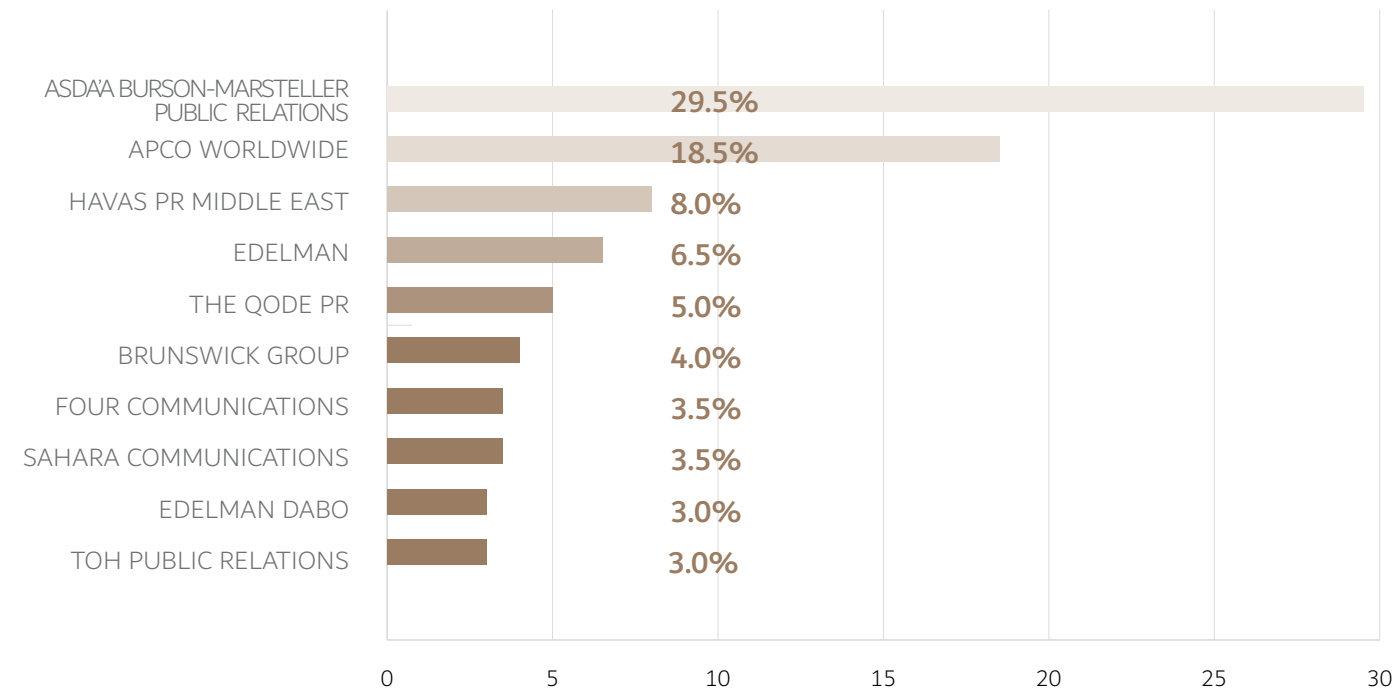
Combined: Top in terms of Media Content Quality, support, fast follow up and interaction

TOP PR AGENCIES

in terms of media content quality
(Sub Index 1)

Media content includes press releases and all editorial content presented to the media on behalf of the client.

► Top PR Agencies – (media content quality)

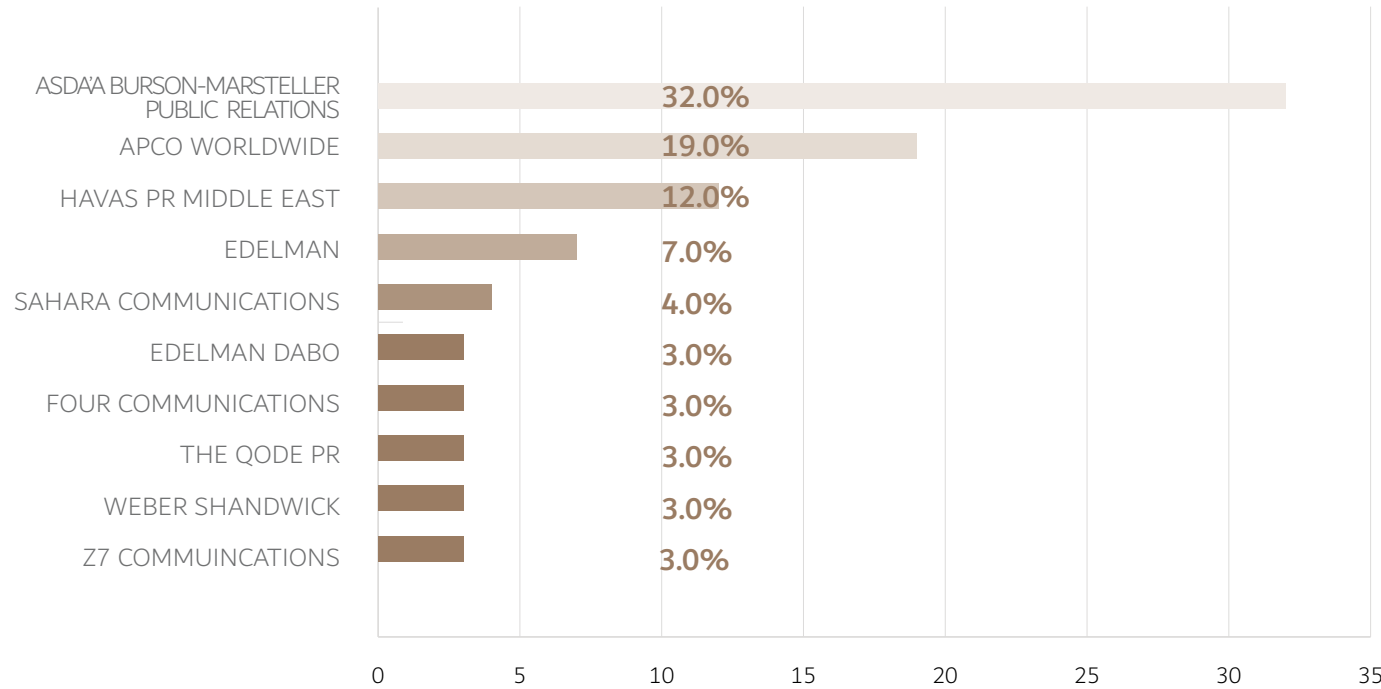


Sample Size: 200 Respondents



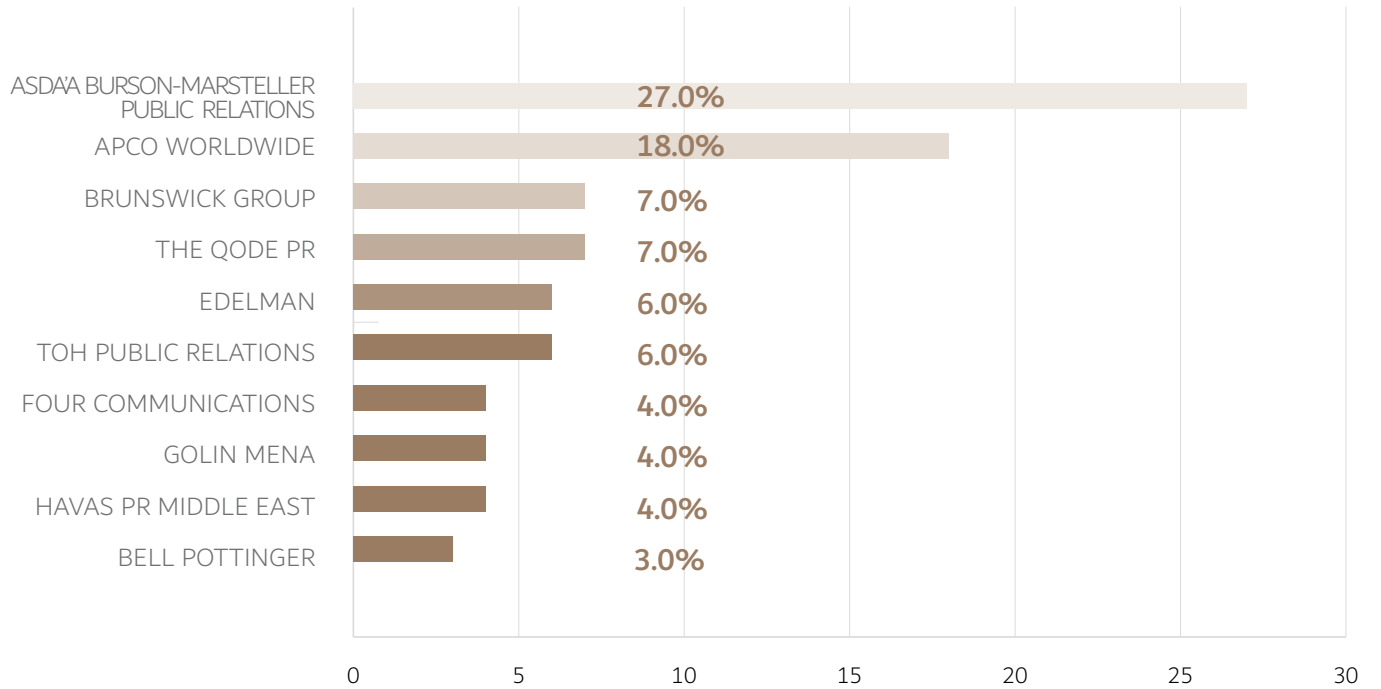
TOP PR AGENCIES
in terms of media content quality
(Sub Index 1)

► Top PR Agencies – (media content quality)
Arabic Editors



Sample Size: 100 Respondents

► Top PR Agencies – (media content quality)
English Editors



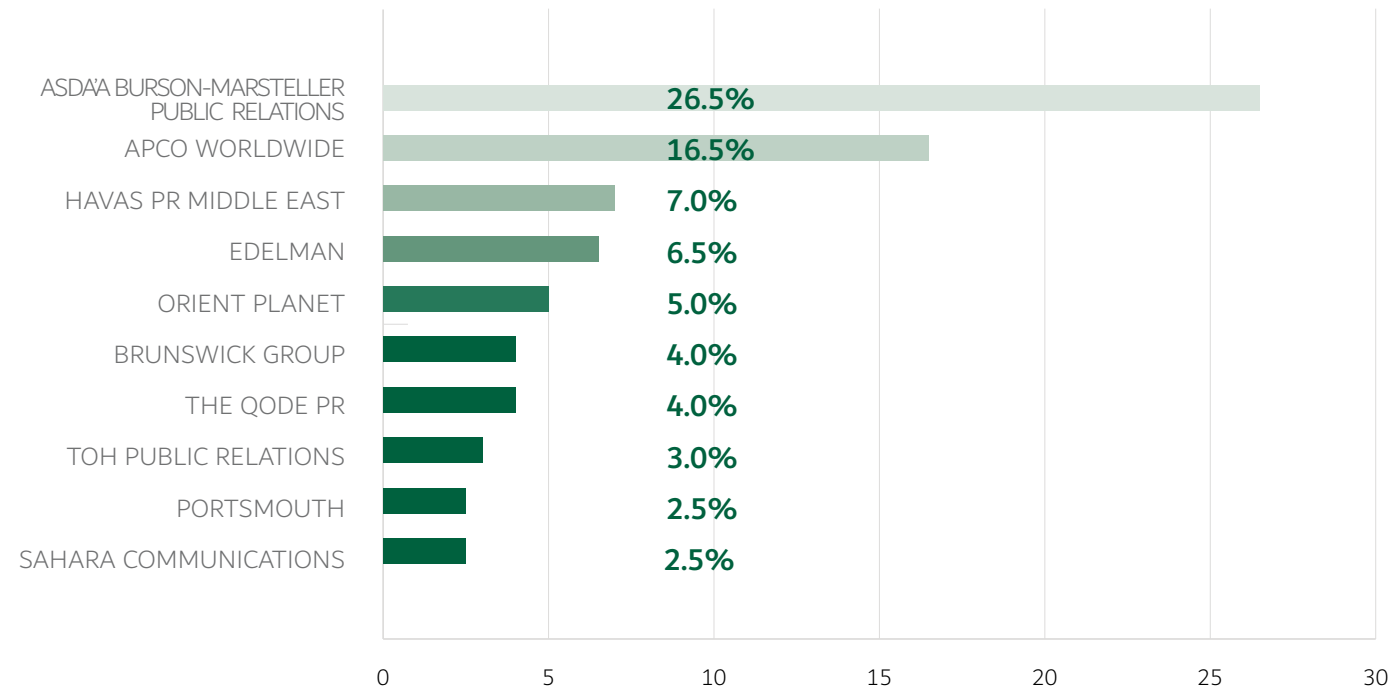
Sample Size: 100 Respondents

TOP PR AGENCIES

in terms of support, fast follow up and interaction
(Sub Index 2)

Includes the level of support, fast follow up, interaction and response with media members' requests, e.g. interviews, information, images, quotes, etc.

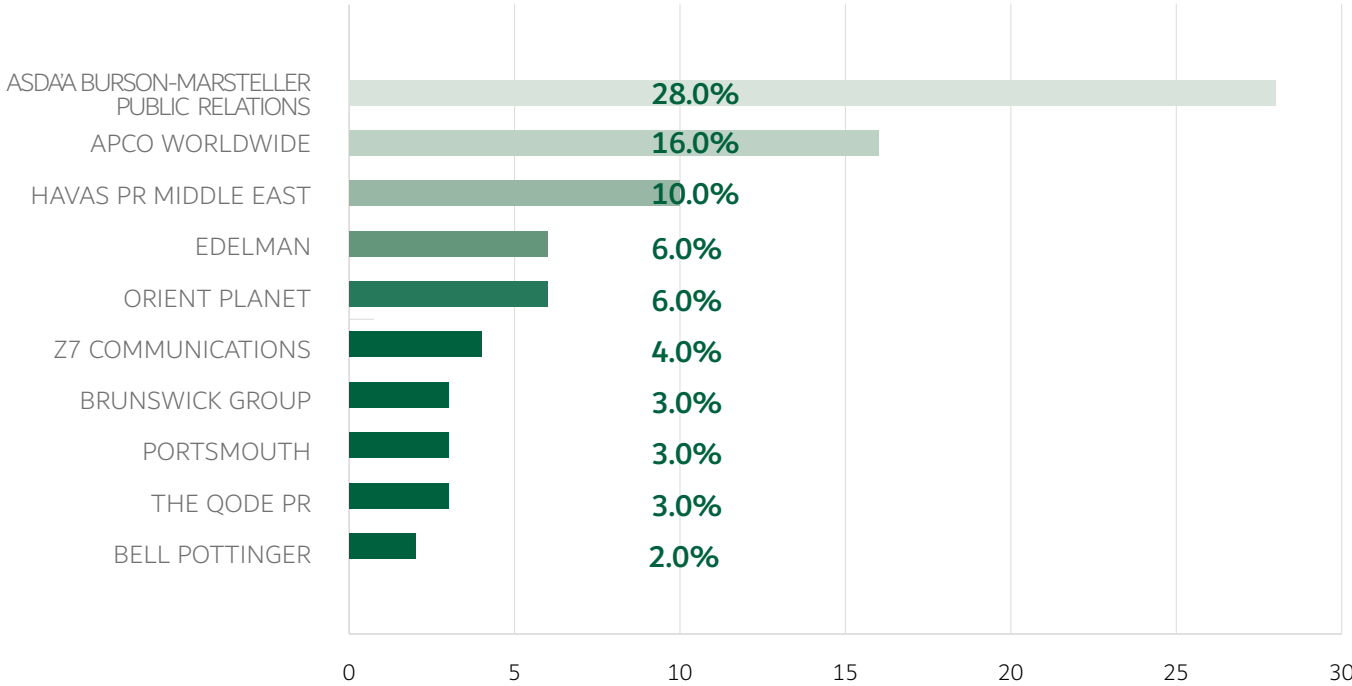
► Top PR Agencies – (support, fast follow up and interaction)



Sample Size: 200 Respondents

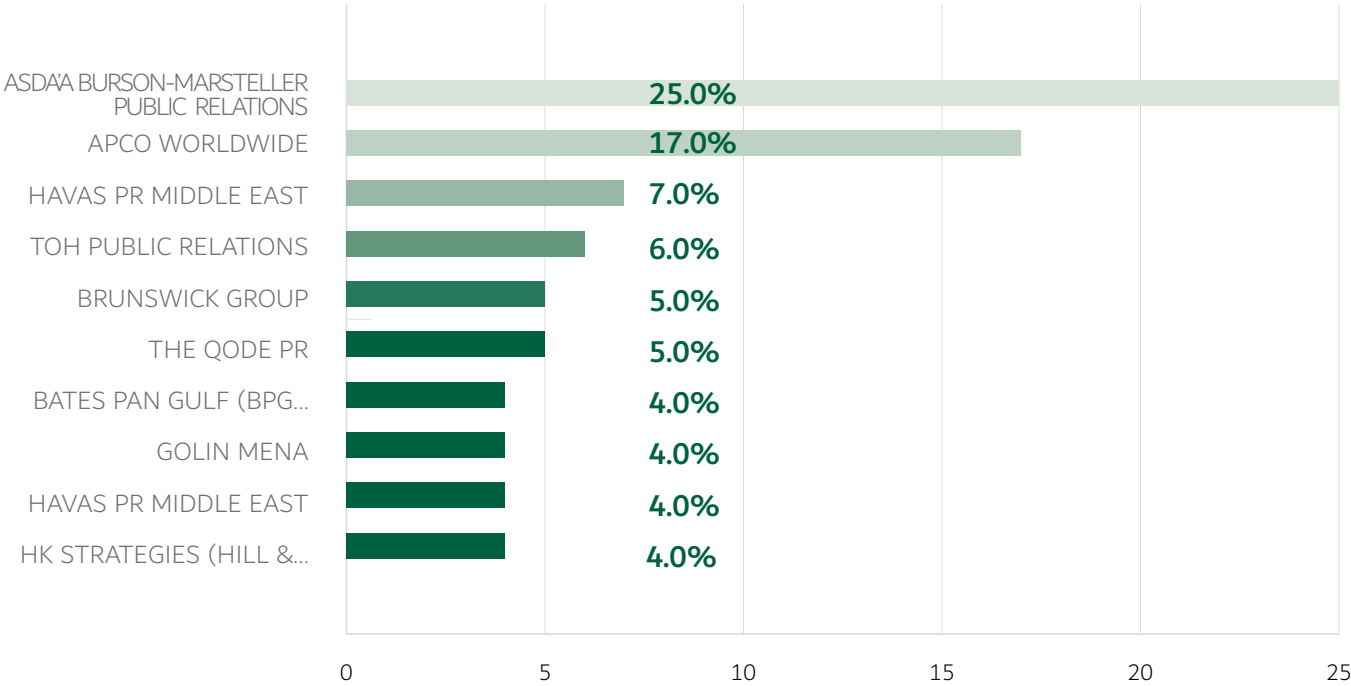


► Top PR Agencies – (support, fast follow up and interaction) **Arabic Editors**



Sample Size: 100 Respondents

► Top PR Agencies – (support, fast follow up and interaction) **English Editors**



Sample Size: 100 Respondents



The independent index aims to identify the most active PR agencies based on journalists' responses to the following questions from the Arab and English media:

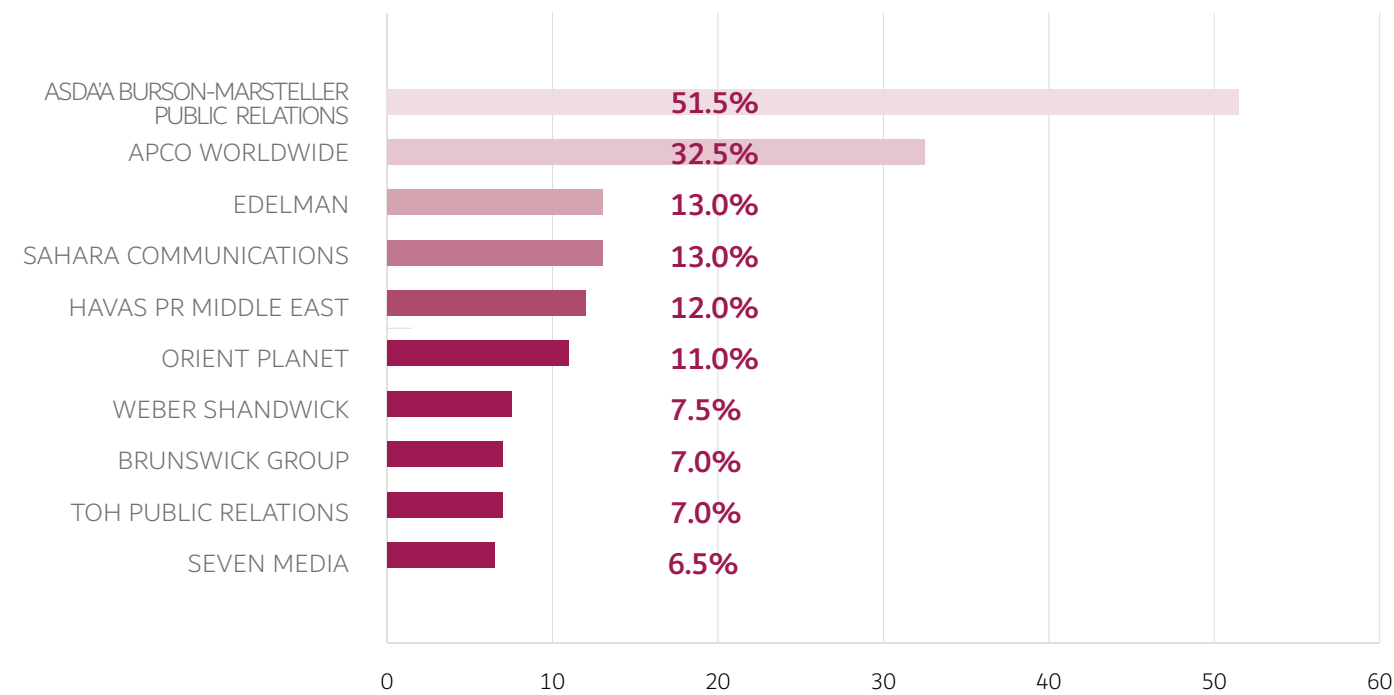
'Multiple answers: can you mention 5 PR agencies you deal with on a regular basis?'

This indicator is not intended to measure the quality of the content or the support and follow-up.

Continuous contact with journalists does not necessarily reflect the quality of PR agencies' work, but indicates their level of activity in dealing with the media on a continuous basis. This could be a reflection of the broad range of clients that these PR agencies represent, in terms of sector or number.

Most Active PR Agencies

► Most active PR agencies – Total

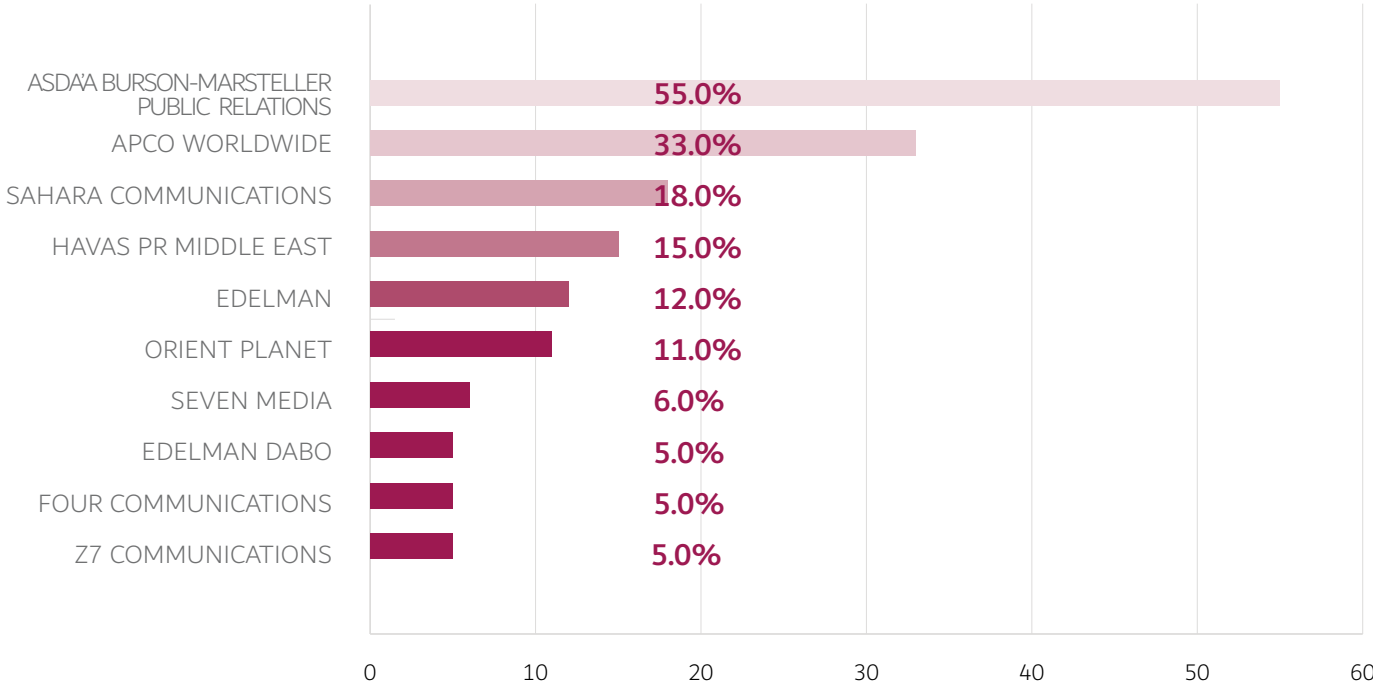


Sample Size: 200 Respondents



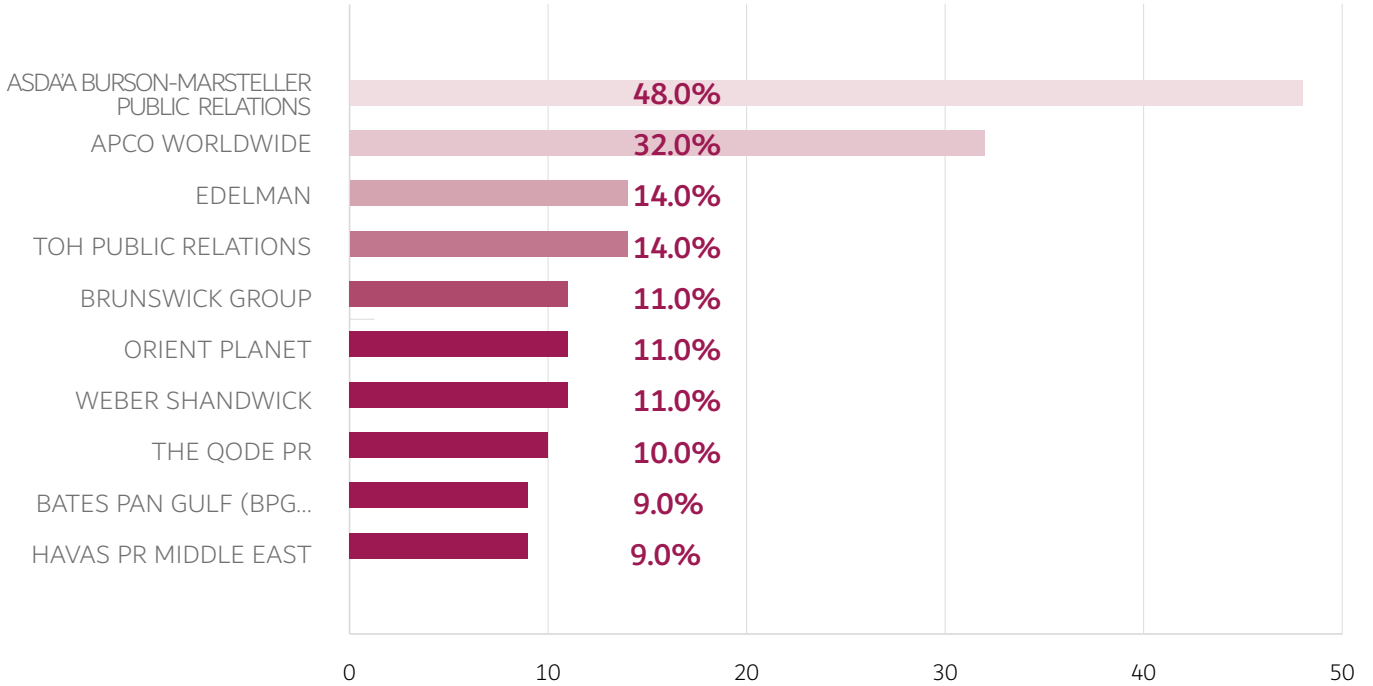
Most Active
PR Agencies

► Most active PR agencies – Arabic Editors



Sample Size: 100 Respondents

► Most active PR agencies – English Editors



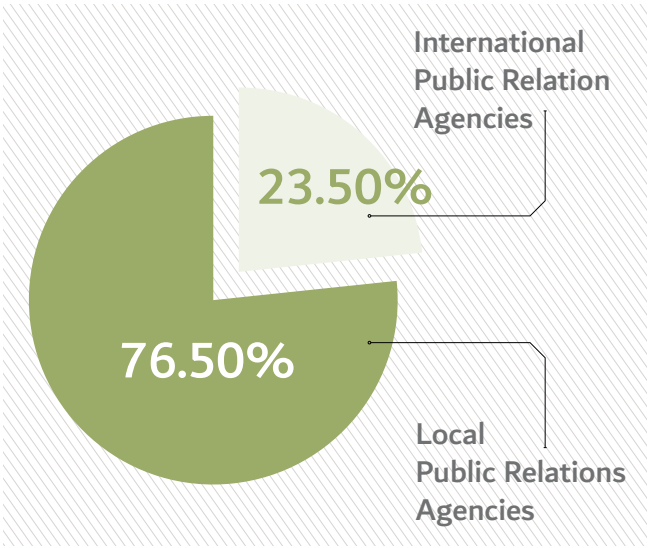
Sample Size: 100 Respondents



► Preference for Work

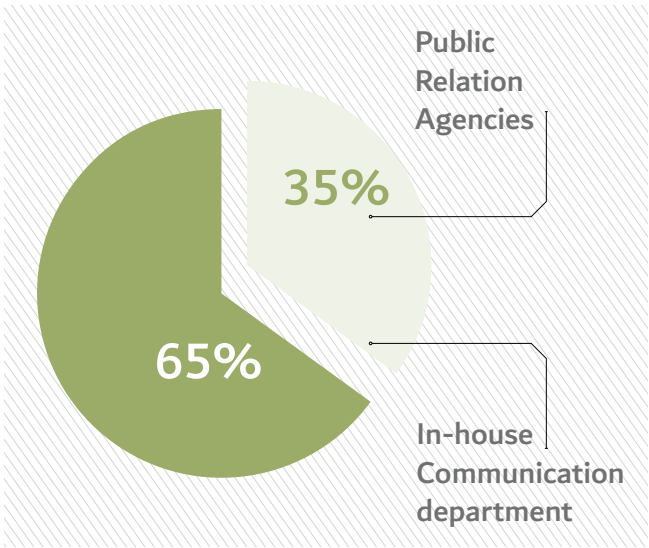
65% of Editors prefer to work with an in-house communication department instead of going to a PR agency; and this can be due to the lack of knowledge, weak communication and absence of coordination when it comes to the public relations agencies. Local PR agencies are recognized to understand more the specificity of the UAE and its local media than International agencies.

Best Understand The Specificity Of The UAE And Directing Its Local Media



Sample Size: 200 Respondents

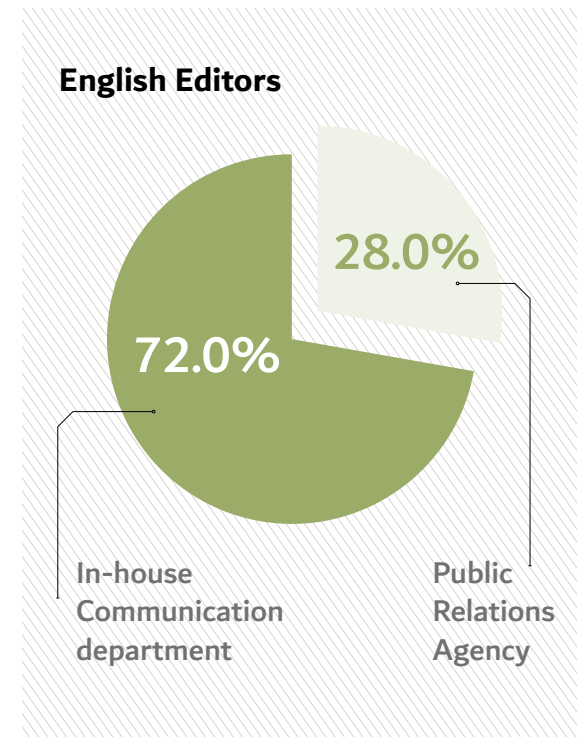
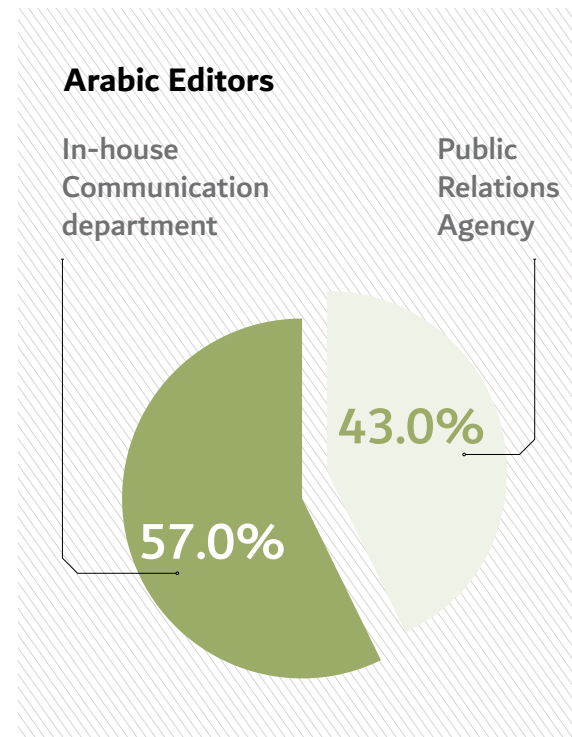
Public relations



► Preference for Work – by language

57% of Arabic Editors and 72% of English Editors prefer the in-house communication department. In addition, English Editors prefer to deal more than Arabs with International PR agencies; 84% of Arabic consider local PR agencies to best understand the specificity of the United Arab Emirates and its local media than the international ones.

Public relations



Sample Size: 200 Respondents

Companies that best understand the specificity of the UAE and directing its local media

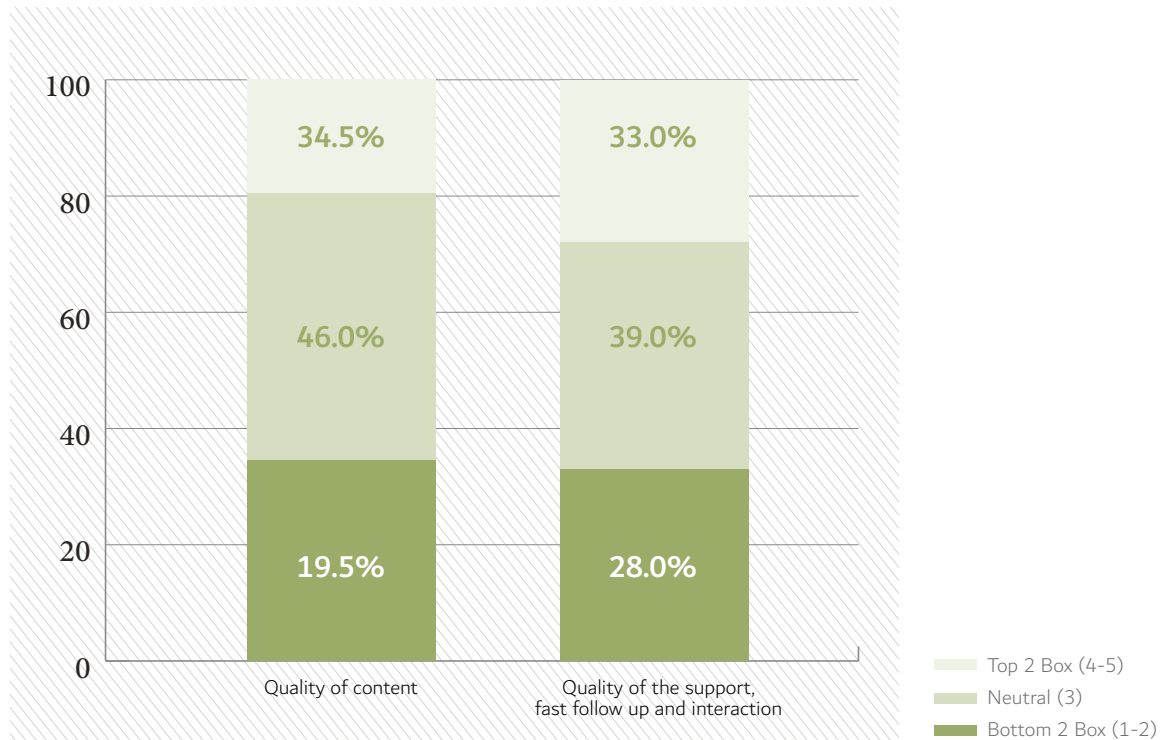


Sample Size: 200 Respondents

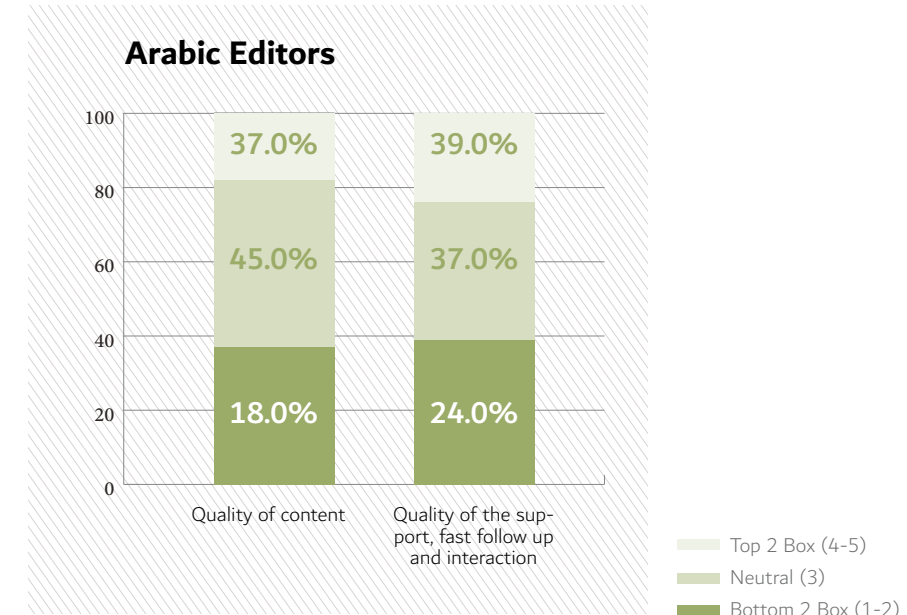
► Quality Evaluation – Total

35% of editors consider the quality of PR agencies content is good enough while almost half of them consider it neither good nor bad.

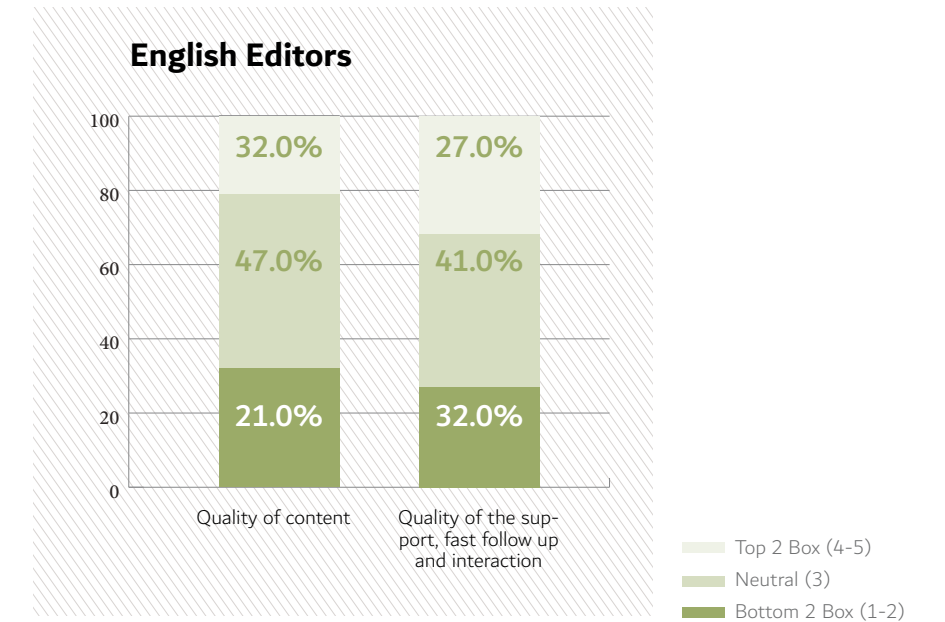
28% of editors are not satisfied with the quality of the support they are getting from pr agencies and consider it very bad.



Sample Size: 200 Respondents



Sample Size: 100 Respondents

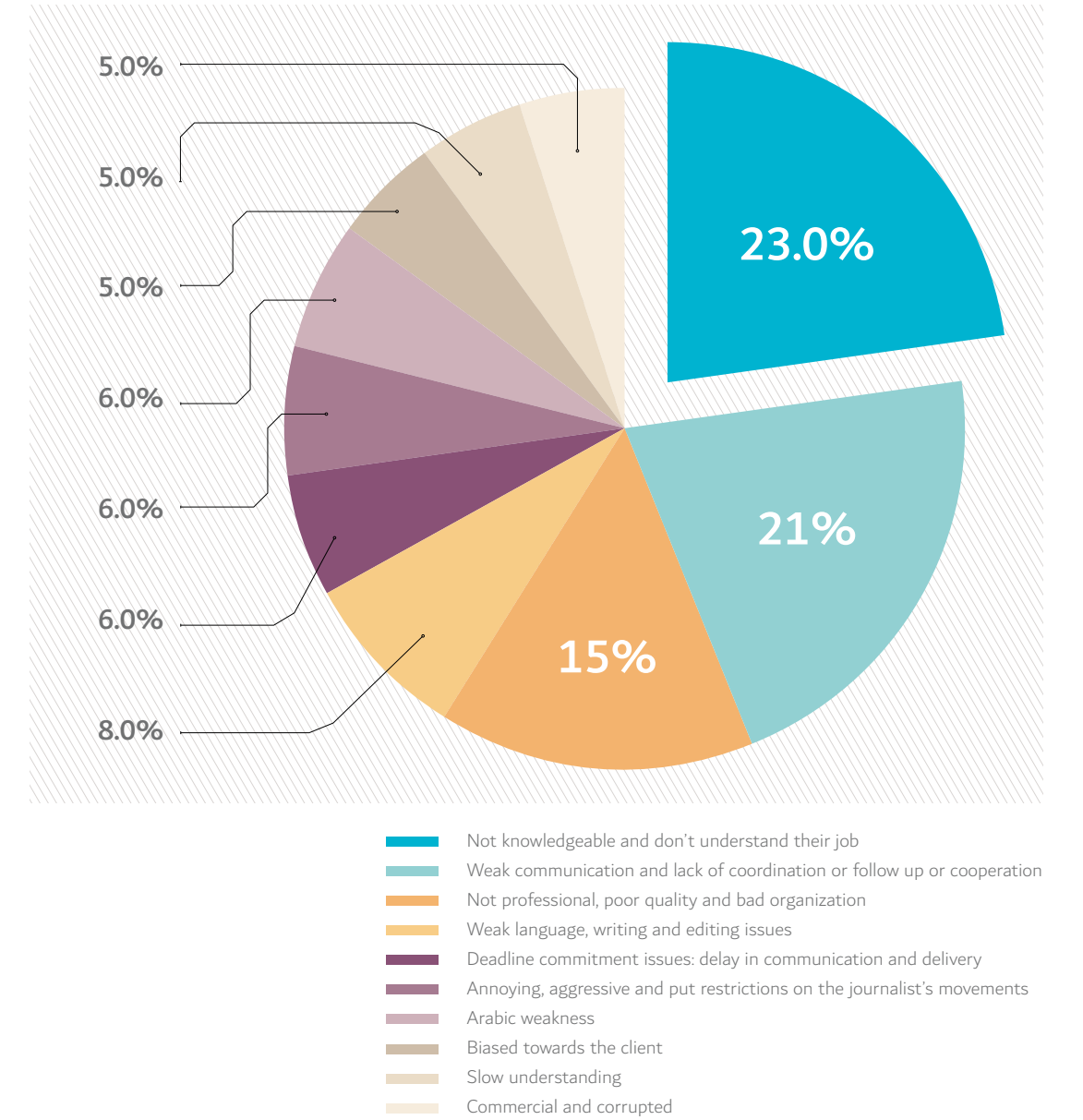


Sample Size: 100 Respondents

WEAKNESSES of PR Agencies

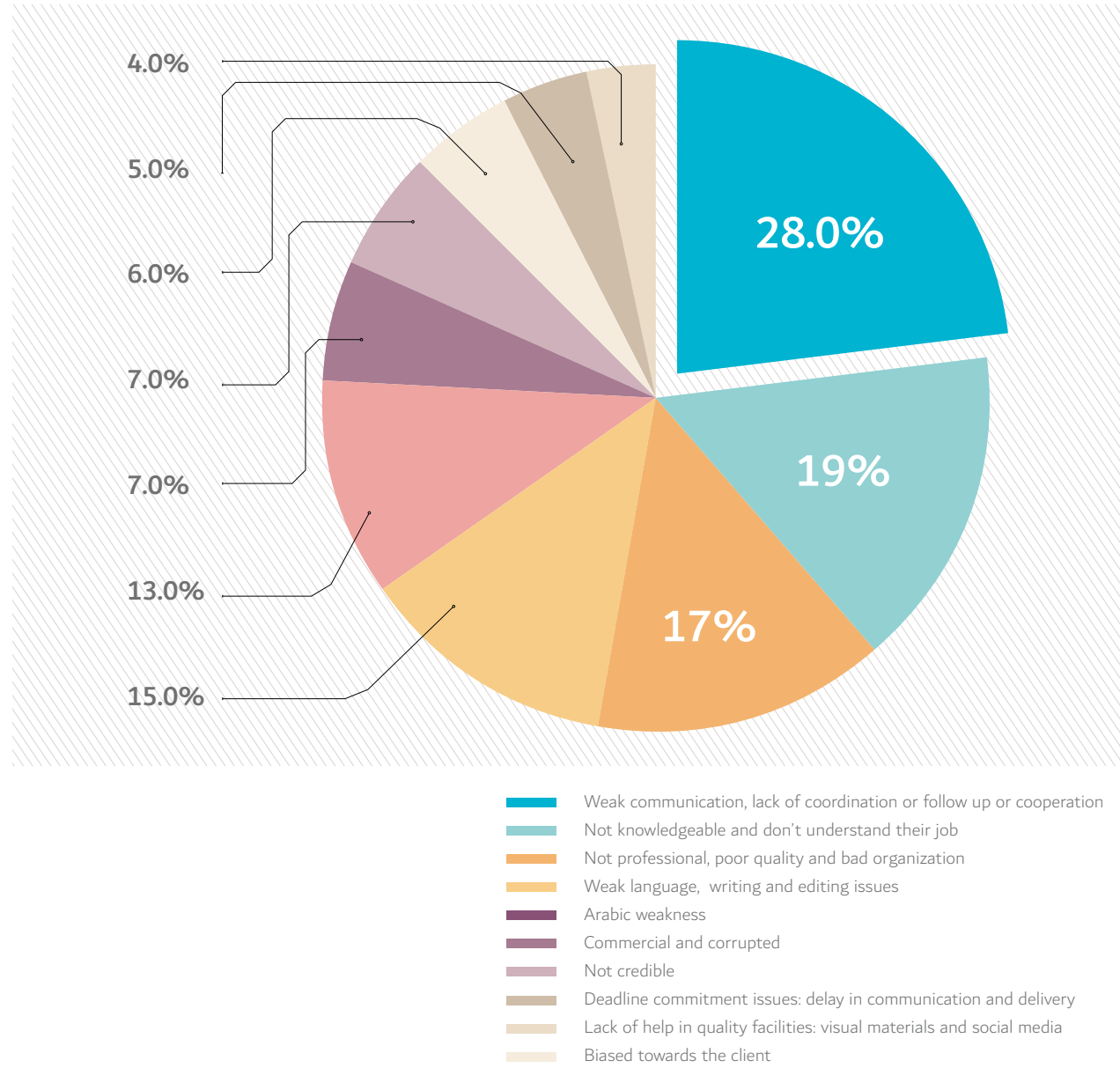


One of the major weaknesses of PR agencies seem to be that the absence of work knowledge (31%), the weak communication and the lack of coordination (28%).



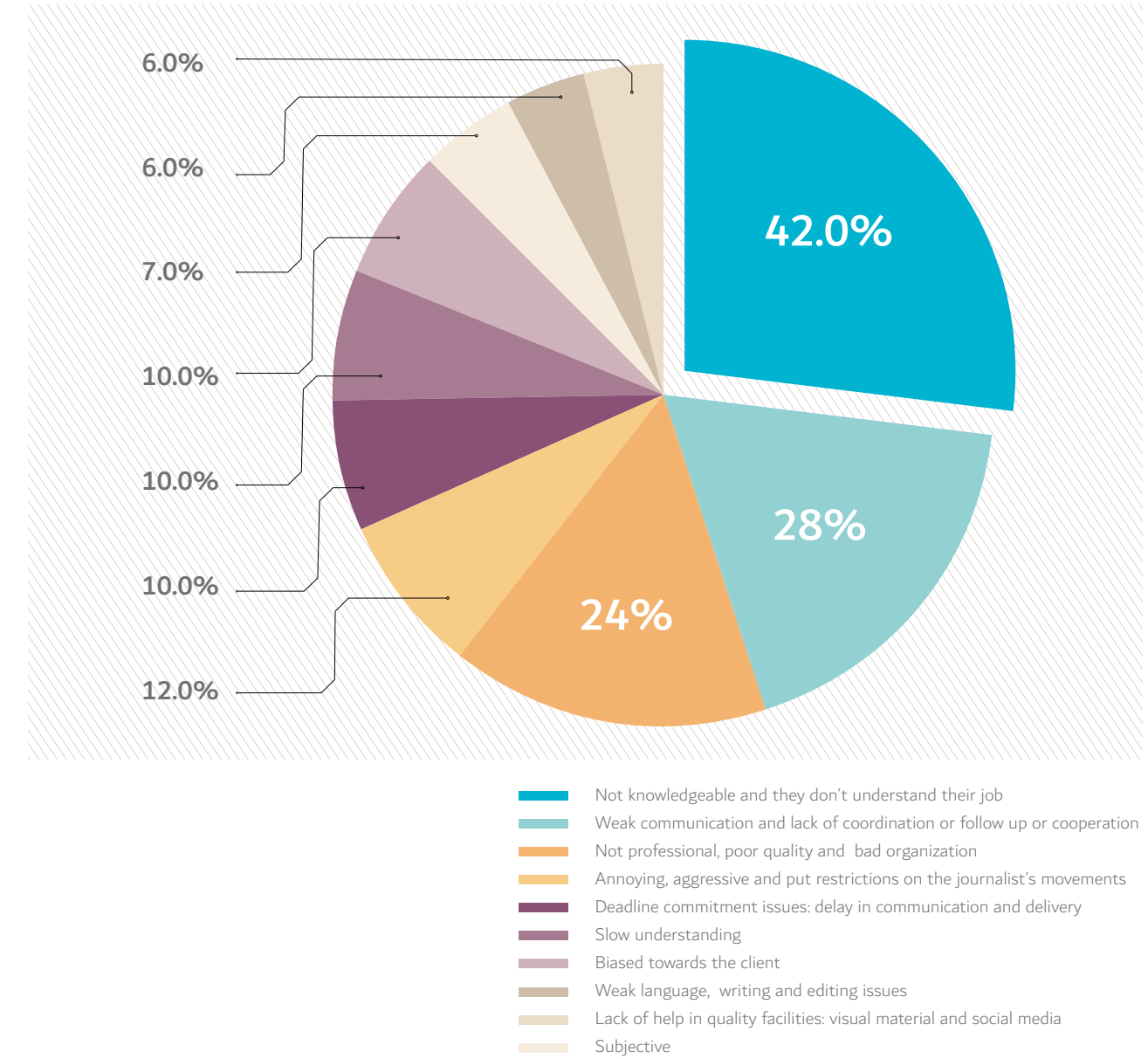
Sample Size: 200 Respondents

► Weaknesses of PR Agencies – Arabic Editors



Sample Size: 100 Respondents

► Weaknesses of PR Agencies – English Editors



Sample Size: 100 Respondents

Thank You

For Your Trust & Confidence



© 2017 Ipsos – All rights reserved.

This proposal constitutes the sole and exclusive property of Ipsos. Ipsos retains all copyrights and other rights over, without limitation, Ipsos' trademarks, technologies, methodologies, analyses and know how included or arising out of this proposal. The addressee of this proposal undertakes to maintain it confidential and not to disclose all or part of its content to any third party without the prior written consent of Ipsos. The addressee undertakes to use this proposal solely for its own needs (and the needs of its affiliated companies as the case may be), only for the purpose of evaluating the proposal for services of Ipsos.

No other use is permitted.



Ipsos Connect

CONTENTPLUS
define | design | deliver

UAE PR Index 2017



Al Thuraya Tower 1, 8th Floor, Dubai Media City.
Dubai, U.A.E.
Tel; +971 4 4408 980
e.mail: info@ipsos.com
web; www.ipsos.com

1- D-OFF-105 | DTEC | DSOA
P.O. Box: 342062, Dubai, U.A.E
Tel; +971 4 39 65 090
e.mail: info@content-plus.net
web; www.content-plus.net