

Summary conclusions

- It is clear from this survey that competition is developing in the mobile and international calls markets, particularly to South Asian destinations such as India.
- However there is still a need to increase the consumer's awareness of the different alternative providers and for the take up of new innovative services which can assist in business growth.
- TRA supports all licensees in their educational and public awareness activities to improve the take up of services.
- TRA has also to address its own profile amongst consumers and explain how it can support consumers in overcoming any issues they may have with suppliers.
- TRA has to remove the remaining barriers to allow competition and innovation across the broad range of telecommunications markets and support this vital sector to grow.
- A wider choice of telecommunication services and enabling consumers to easily switch providers, will support the further development in terms of quality of service, innovation as well as competitive prices
- Survey tables should be useful for all operators to some degree. Consider what you need to do to address findings
- TRA to address market communications
- TRA to issue the Strategic Market Review by the end of the month for consultation period
- The consumer survey is just one input.
- The Strategic Review will be addressing such aspects as:
 1. Rebalancing of tariffs, per second billing and Retail price controls
 2. Number portability
 3. Unbundling the local loop
 4. MVNO and mobility
- TRA actions will be to support growth in competitive services but at the same time adapt the controls on markets which are competitive
- We still have some way to travel down the competition road

Residential

- 1/3rd of households do not have a fixed line
- Low correct awareness of the Monthly Rentals and Billing Pulse observed amongst the fixed line customers.
- The majority think they are paying more than they are actually paying. This may account for the fact that more than 30% saying they are unhappy about 'Value for money'.
- Circa 90% of consumers are satisfied with the reliability and response of their provider.
- However given the situation at the time of the survey 34% of consumers would change providers if they could keep their telephone number
- 99% of people have a mobile telephone with 11% having two or more
- Batelco has circa 70% market share with MTC having the remainder
- There is a low usage of value added services
- Circa 90% of consumers are satisfied with the reliability and response of their mobile provider
- Circa 30% are unsatisfied with call tariffs
- Circa 30% have not changed provider as they are unable to keep their telephone number
- Circa 40% residential customers do not make international calls. These customers are mainly Bahraini Nationals.
- Circa 50% of international calls are made using a Mobile with less than 10% of international calls being made from Internet shops, mainly by Indians
- Top five destinations are to Saudi Arabia, UAE, India Qatar and Kuwait
- The majority of calls are greater than 3 minutes with calls made through Internet / Cyber café last more than 10 minutes (possibly due to lower charges)
- More than 60% of people pay for international calls as a part of their fixed or mobile monthly bill – Nationals and westerners?
- 44% expressed dissatisfaction with the price – Nationals and westerners?
- 123 and Bahrain calling cards are the most popular cards for making international calls
- Tariffs are by far the most important factor when it comes to international calls with a high level of dissatisfaction
- More than 50% of households have internet connection
- circa 35% having a broadband package
- Virtually 100% of broadband packages are from Batelco
- Highest level of dissatisfaction cw fixed and mobile
- Low use of mobile internet
- TRA has to ensure the TRA "keep asking" booklet gets out
- Licensees to ensure customers are made aware of TRA in appropriate manner
- Improve consumer and Business Groups
- Improve PR campaign

Business

- In the companies with less than 100 employees i.e. the vast majority tariffs is the most important decision making factor followed by Quality of service
- Businesses are generally happy with Batelco fixed and mobile services but circa 30% expressed concern about charges. However there is marginally higher level of satisfaction with mobile than fixed line services
- But people do not know how they are being charged with only 1% getting it right!!
- There is very low awareness of fixed line service provider other than Batelco with Batelco having close to 100% of the fixed line market
- Close to 40% of businesses do not have mobiles in the name of the business. Of those that do circa 90% are from Batelco (Table 38)
- Low use of VAS on fixed and mobile - only 15% - 18% use voice mail
- SMS is the highest used VAS on mobile
- Circa 50:50 national and international calls are below or above 3 minutes in duration from fixed or mobile
- 93% believe their specific number is important to them
- Circa 18% would switch provider but then only if they could keep their number and charges were less and the service was better
- Circa 75% of International calls made by IDD from fixed line
- Greater than 35% of business are unhappy about the cost of dialing international calls
- 33% of companies do not use broadband or any form of data services of those that do virtually 100% are with Batelco with 512 kBits (10GB) being the most common package. Of those that do there appears to be allow usage of e applications and ICT solutions
- 18% still have dialup INET service
- Higher levels of dissatisfaction with data services than mobile or voice in particular in terms of effective speed, service response and in particular price
- Majority of expenditure remains on fixed line voice services followed by mobile and then data. The trend will be interesting to see when the survey is next conducted