



Consumer Experience with the Main Telecommunications Providers- Business Users Report

July 2016

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STUDY OVERVIEW



Background

- The Telecommunications Regulatory Authority of the Kingdom of Bahrain (TRA) was established in 2002. TRA is an independent body aiming at developing a competitive communication market & protecting the interests of subscribers and users.
- As part of its role, TRA wanted to gain insights on consumer experience with the main telecommunications providers . The key objectives was to assess the level of satisfaction of Mobile, Broadband, & Fixed telephony on the overall level, and across multiple touch points. Businesses awareness of TRA and its services was also a key objective of this study. Further, TRA wanted to determine development areas in order to enhance users' experience within telecommunications sector in the Kingdom of Bahrain.
- In that respect, TRA contacted Ipsos Bahrain to carry out market research survey addressing the above needs.
- Ipsos conducted the research survey with both residential & business consumers. The report at hand presents the key findings and insights of the business users survey.
- The data collection was carried out during the November – December 2015.

Research Objectives

Main objective

This study aims at assessing the business users' awareness of TRA and satisfaction level with Telecommunication Providers.

Measure businesses' satisfaction across multiple components (Primary & Secondary levels)



Identify the impact of each Primary & Secondary component on the overall satisfaction



Develop action plan per touch point based on improvements needed to increase businesses' satisfaction



Research Methodology

- The research was conducted through Pen & Paper Interviews (PAPI). All interviews were done Face-to-Face interviews with respondents at their convenience, using a structured questionnaire.
- Respondents were contacted prior the interview in order to confirm their eligibility and willingness to participate in the survey. An appointment is taken according to their convenience upon acceptance.
- A team of well-experienced and trained interviewers, met with respondents and carried-out the survey with them.
- After conducting the survey, a series of quality measures take place to ensure delivering highest quality, and error-free data. These measures are:
 - Editing & logical check for 100% of interviews
 - Back Checking of respondents' answers is done for at least 40% of interviews split across all interviewers
 - Ensure that each interviewer not exceed 8-10% of the total sample size
 - Quality control reports check by the Operation manager which they are reporting directly to him

Sample Design

- The research followed a quantitative approach through conducting Face-to-face interviews with businesses using a structured questionnaire. Interviews were split as follows:

By Company Size	Counts	%
Large (50+ Employees)	50	10%
Medium (20-50 Employees)	200	40%
Small (Less than 20 Employees)	250	50%
Total	500	100%

By Sector	Counts	%
Wholesale and retail trade, repair of motor vehicles and motorcycles	240	48%
Manufacturing	80	16%
Construction	80	16%
Real estate activities	40	8%
Accommodation and food service activities	40	8%
Financial and insurance activities	15	3%
Education	5	1%
Total	500	100%

- All Interviews were conducted with Authorized Contact Persons (SPOC)

Satisfaction Approach

Delight, satisfaction and dissatisfaction – On questions asked to measure the satisfaction level of the respondents on a scale of 1-10, where 1 indicates complete dissatisfaction and 10 indicates complete satisfaction, the top rating points – **10 and 9** are combined to constitute the '**delight**' factor. It represents a very high level of customer satisfaction. Scores of **8 and 7** are to form the '**satisfaction**' factor. This represents satisfaction among the respondents, but not to the level of delight. '**dissatisfaction**' factors are the ones with **scores of 6 and below** and they indicate a low level of satisfaction. For illustration purpose, they are color coded in the following manner:



MOBILE



SUMMARY OF BUSINESS MOBILE SERVICES MARKET

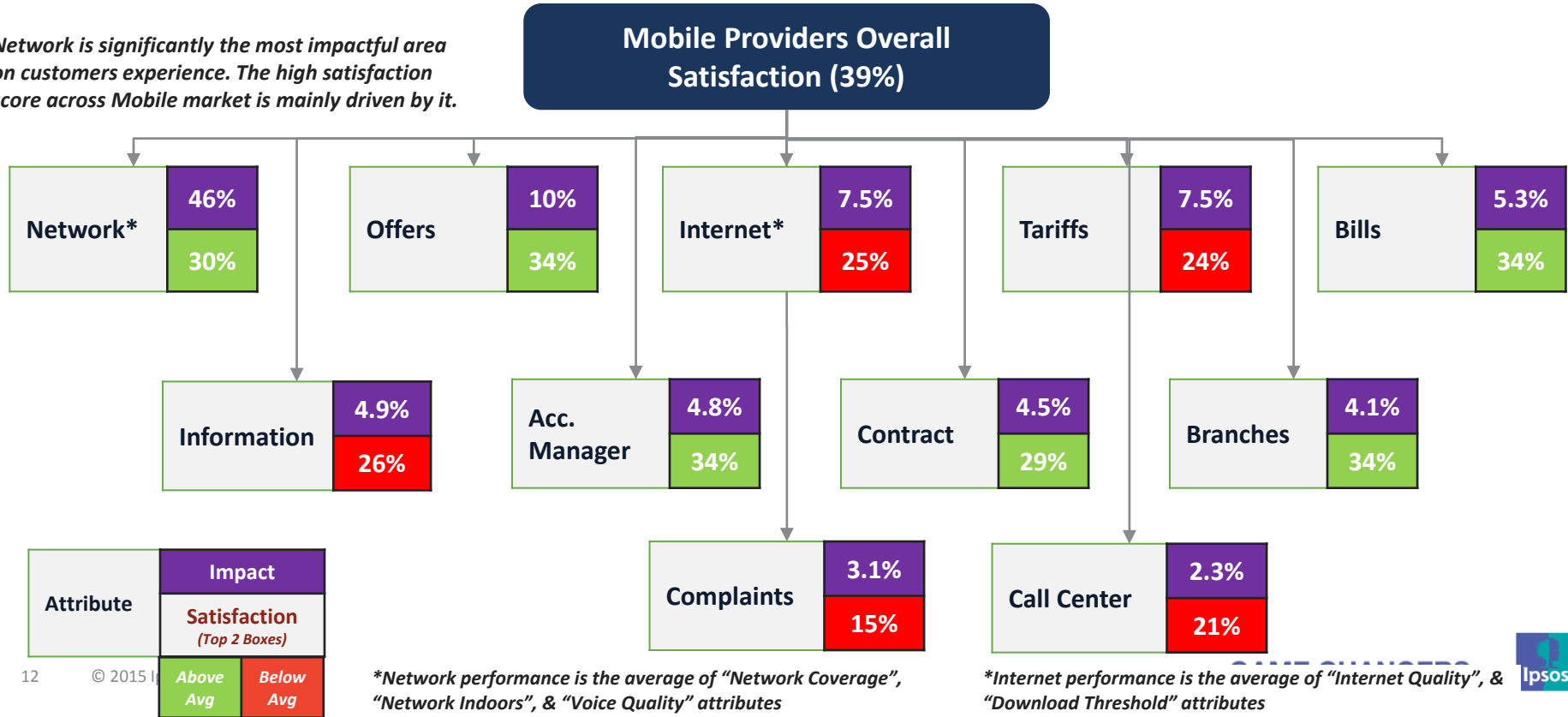
Summary Of Businesses' Experience With Mobile Operators

- Businesses were satisfied from their experience with Mobile Operators. Businesses subscribing with Zain were significantly less satisfied than others. Further, the satisfaction of Mobile services was driven by small business. The larger company size, the lower satisfaction score.
- Despite that businesses had high overall satisfaction scores, however the satisfaction was shifted when assessing the detailed experience aspects. This is mainly attributed to the impact of “Brand Perception” on the satisfaction.
- This satisfaction trend is driven by different experience touch points, mainly **Network, Offers, Bills, Account Manager, Contract & Branches**. The satisfaction of these aspects came above average.
- However, the experience bottlenecks came mainly across **Internet**. Businesses suffered from the **unreliable internet connection**, in addition to the **download threshold**.
- **Mobile Tariffs** is considered another key dissatisfaction area across businesses. Almost a third of mobile users suffered from the **clarity of tariffs, and unavailability of key tariff information**.
- Another challenges faced by businesses for their mobile experience are seen for Information Awareness, Complaints & Call Center. However, these aspects are with low impact on the satisfaction score.

SATISFACTION DRIVERS OF BUSINESS MOBILE MARKET – ROOT CAUSE ANALYSIS

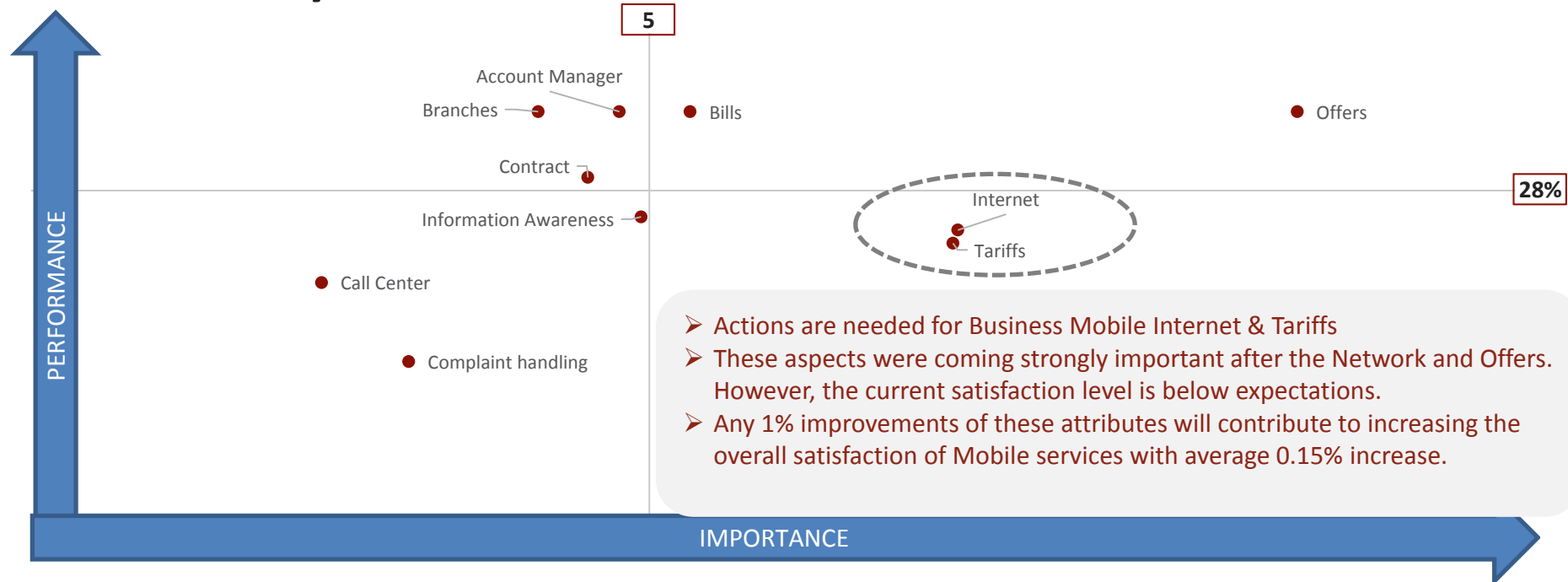
Tariffs & Mobile Internet Are Decreasing Customers' Satisfaction

Network is significantly the most impactful area on customers experience. The high satisfaction score across Mobile market is mainly driven by it.



ACTION PLAN – IMPORTANCE VS. PERFORMANCE MATRIX

1% Improvements in Mobile Internet & Tariffs Will Increase Satisfaction by 0.15%

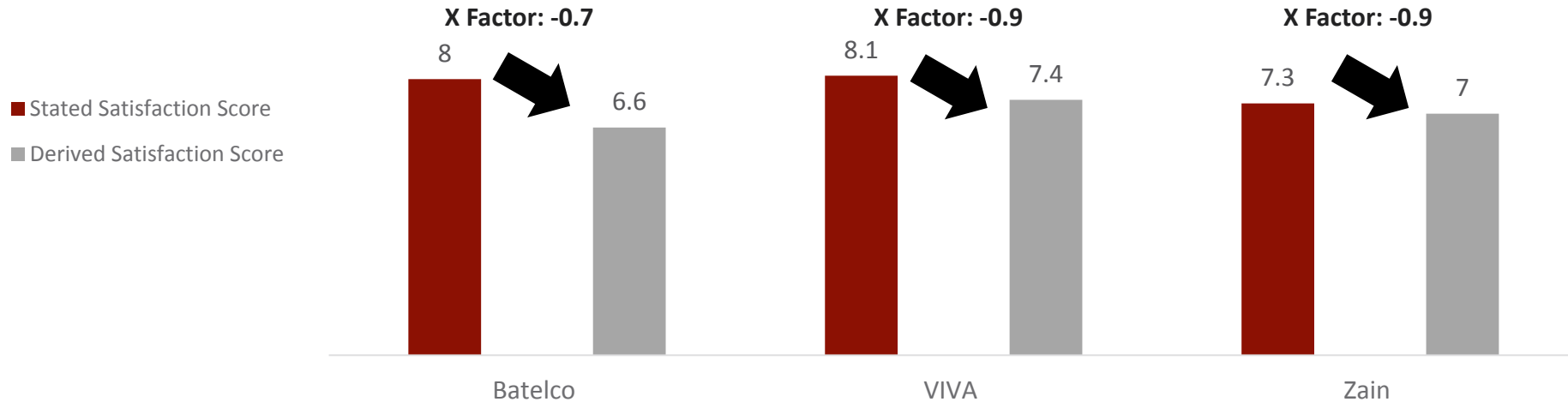


**Mobile Network came as the most important aspect which diluted results.
Network was excluded from the matrix to have proper action plan*

SATISFACTION DRIVERS OF MOBILE SERVICES – SATISFACTION X FACTOR

Business Perception Of providers Is Increasing Their Satisfaction

- The relationship between Businesses & their providers is positively affecting the overall satisfaction score. Businesses are actually less satisfied from their experience of different functional touch points (Derived Satisfaction score), than what they expressed during the interview (stated satisfaction score). This **X Factor** is the impact of “**Brand Perception**” on the satisfaction score.



providers need to enhance their functional touch points to increase the actual satisfaction score

What Are Improvements Needed Across Below Average Attributes?

Based on the action matrix and the current performance level of Tariffs & Internet, we recommend the following:

➤ Network:

- Maintain the high performance of mobile network attributes and ensure providing customers with best experience in **coverage & voice quality**

➤ Tariffs

- **Tariff Clarity Without Any Hidden Costs or Conditions** is the key focus for current tariff scheme. providers should clearly communicate all tariff details to customers. Any 1% improvements in this aspect will increase market overall satisfaction score by 0.075% on average.

➤ Mobile Internet

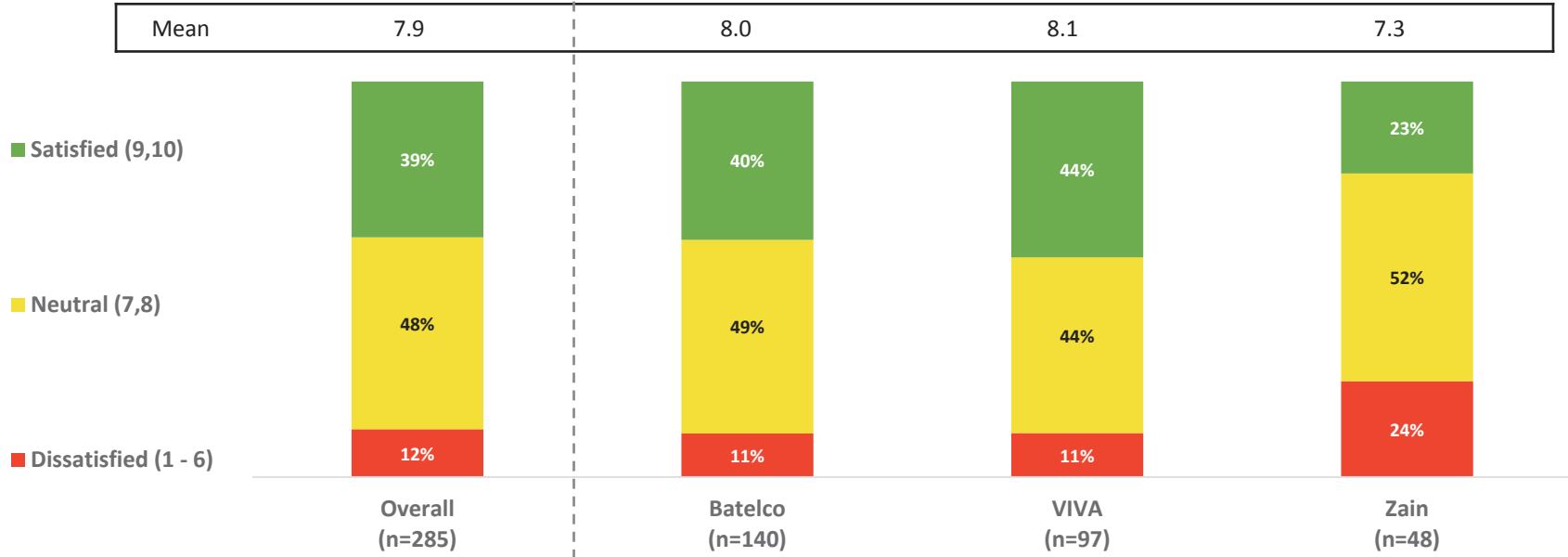
- The **Data Quality Experience** seems to be challenging. providers should focus on providing customers with the best data experience and maintain a high service stability level. Also providers are advised to increase the internet download limit for Businesses. Any 1% improvement improvements in this aspect will increase market overall satisfaction score by 0.075% on average.

DETAILED FINDINGS OF MOBILE

OVERALL SATISFACTION OF MOBILE SERVICES

Businesses Are Satisfied From Their Experience With Mobile Operators

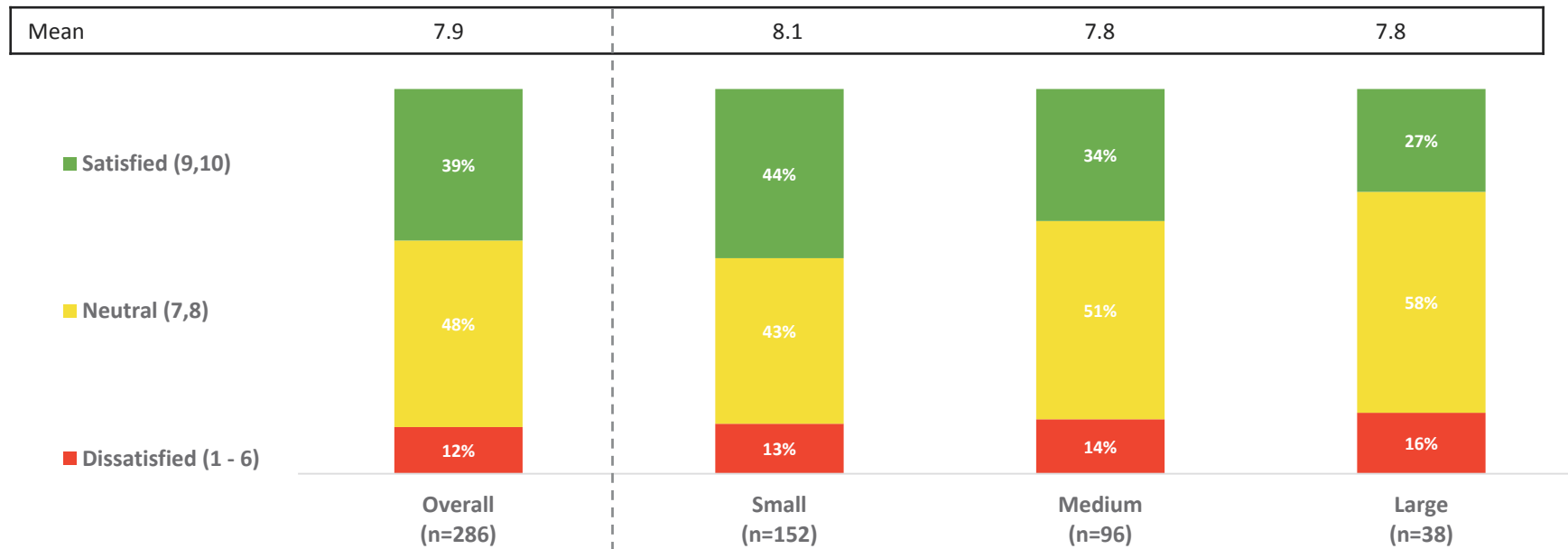
- This high satisfaction was coming across all providers. Though, Businesses subscribing with Zain scored lower satisfaction score than others.



MOBILE OVERALL SATISFACTION BY COMPANY SIZE

Satisfaction Is Driven By Small Businesses

- The larger company size, the lower satisfaction score expressed from businesses. This is attributed to their needs and amount of Mobile services used by each company type.





BUSINESSES' EXPERIENCE WITH MOBILE PROVIDERS' SERVICE AND NETWORK

Satisfaction Scores Across Attributes Shifted To Neutral

- Network Coverage Indoors is a key concern across businesses. Further, Data Experience & Internet Threshold across Zain subscribers are key dissatisfaction areas.

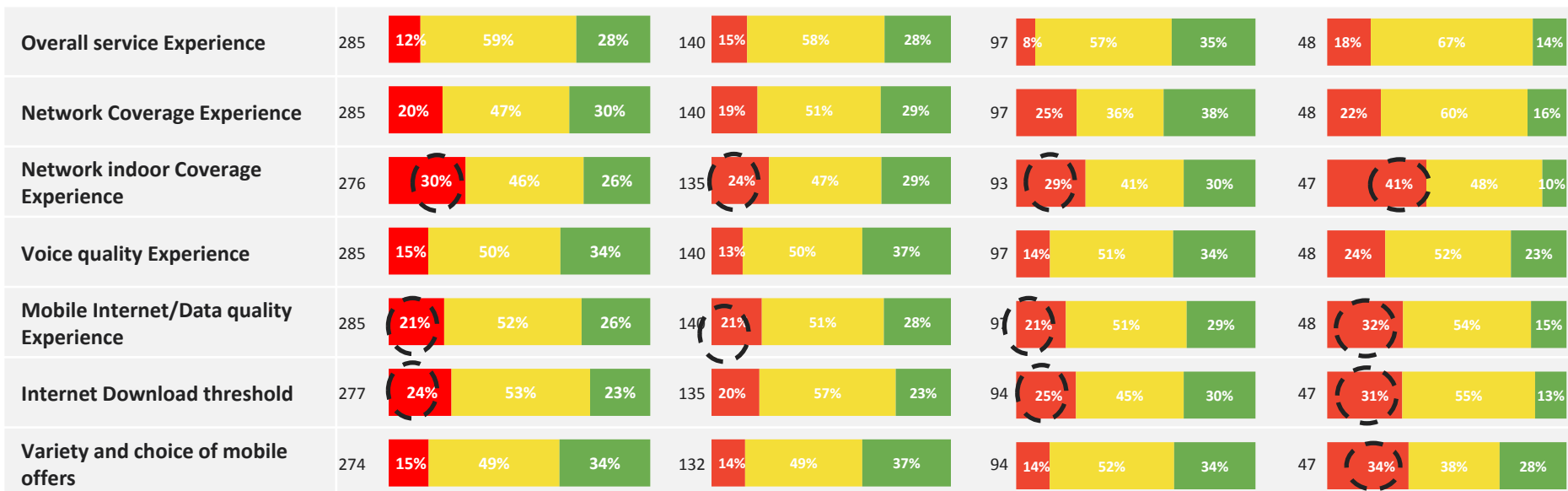
■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall

Batelco

VIVA

zain





BUSINESSES' EXPERIENCE WITH MOBILE PROVIDERS' ACCOUNT MANAGERS

SATISFACTION OF PROVIDERS' ACCOUNT MANAGERS

34% of Businesses Are Satisfied From Providers' Account Managers

- Dissatisfaction stems from the irregular visits of providers' AM. Another painful part in their experience with Account Manager is the time taken to address queries. Zain lags behind rivals in promptness of delivering services.

■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)



Overall Account Manager	118	<div><div>10%</div><div>56%</div><div>34%</div></div>	65	<div><div>7%</div><div>60%</div><div>34%</div></div>	31	<div><div>16%</div><div>45%</div><div>39%</div></div>	22	<div><div>14%</div><div>59%</div><div>27%</div></div>
Easily Accessible	119	<div><div>14%</div><div>57%</div><div>29%</div></div>	64	<div><div>14%</div><div>58%</div><div>28%</div></div>	33	<div><div>12%</div><div>48%</div><div>39%</div></div>	22	<div><div>14%</div><div>68%</div><div>18%</div></div>
Regular Visits of AM	117	<div><div>33%</div><div>47%</div><div>20%</div></div>	63	<div><div>29%</div><div>52%</div><div>19%</div></div>	33	<div><div>33%</div><div>42%</div><div>24%</div></div>	21	<div><div>43%</div><div>38%</div><div>19%</div></div>
AM Knowledge of telecom products and their details	122	<div><div>17%</div><div>52%</div><div>31%</div></div>	67	<div><div>11%</div><div>55%</div><div>32%</div></div>	32	<div><div>18%</div><div>44%</div><div>37%</div></div>	23	<div><div>26%</div><div>57%</div><div>18%</div></div>
Ability to understand your business needs	123	<div><div>17%</div><div>54%</div><div>29%</div></div>	68	<div><div>19%</div><div>50%</div><div>31%</div></div>	32	<div><div>12%</div><div>62%</div><div>25%</div></div>	23	<div><div>17%</div><div>52%</div><div>30%</div></div>
Turnaround time to address your queries/problems	124	<div><div>25%</div><div>54%</div><div>21%</div></div>	69	<div><div>25%</div><div>54%</div><div>20%</div></div>	32	<div><div>25%</div><div>47%</div><div>28%</div></div>	23	<div><div>21%</div><div>65%</div><div>13%</div></div>
Promptness in delivering products and service to you	123	<div><div>18%</div><div>50%</div><div>33%</div></div>	68	<div><div>14%</div><div>51%</div><div>34%</div></div>	33	<div><div>15%</div><div>45%</div><div>39%</div></div>	22	<div><div>28%</div><div>50%</div><div>23%</div></div>
Ability to suggest solutions meet your business needs	122	<div><div>22%</div><div>52%</div><div>27%</div></div>	68	<div><div>17%</div><div>56%</div><div>25%</div></div>	32	<div><div>22%</div><div>44%</div><div>34%</div></div>	22	<div><div>28%</div><div>50%</div><div>23%</div></div>

BUSINESSES' EXPERIENCE WITH MOBILE PROVIDERS' BRANCHES

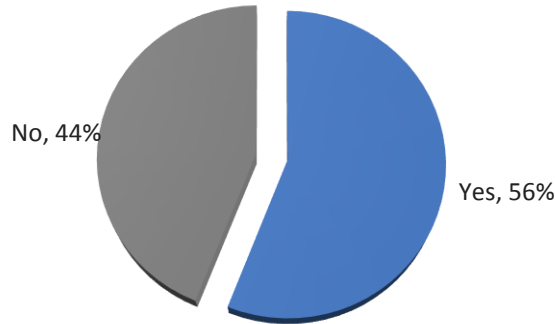


VISITING PROVIDERS' BRANCHES IN PAST 6 MONTHS

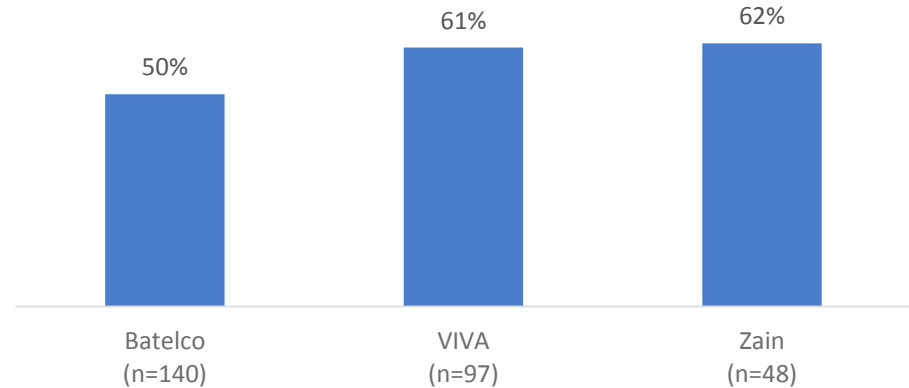
More than Half Of Businesses Visited providers' Branches In Past 6 Months, Specially VIVA & Zain

Overall

By provider



Base: All Respondents; 285



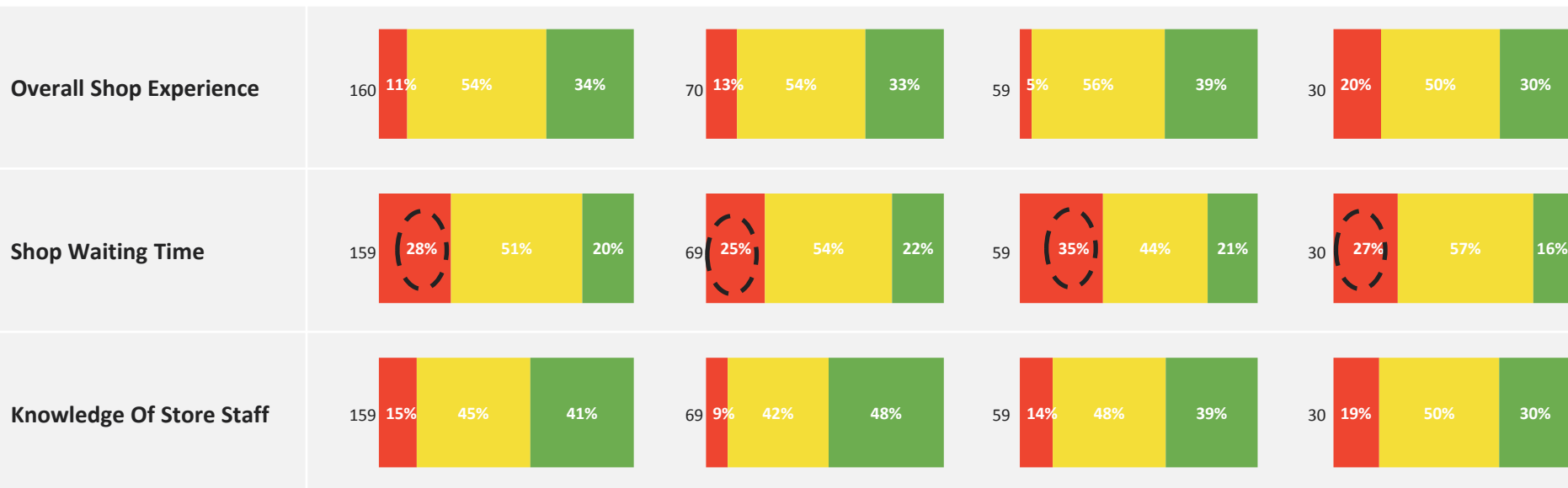
SATISFACTION OF PROVIDERS' BRANCHES

Experience With Branches Are Average, Waiting Time Is An Issue

➤ Businesses are dissatisfied with the “Waiting Time”. This is seen across all providers, specially those who visited VIVA.

■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall





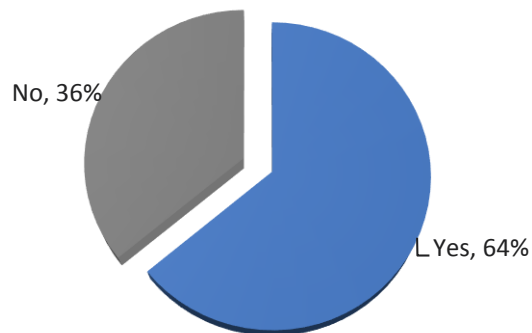
BUSINESSES' EXPERIENCE WITH MOBILE PROVIDERS' CALL CENTER

EXPERIENCING PROVIDERS' CALL CENTER IN PAST 6 MONTHS

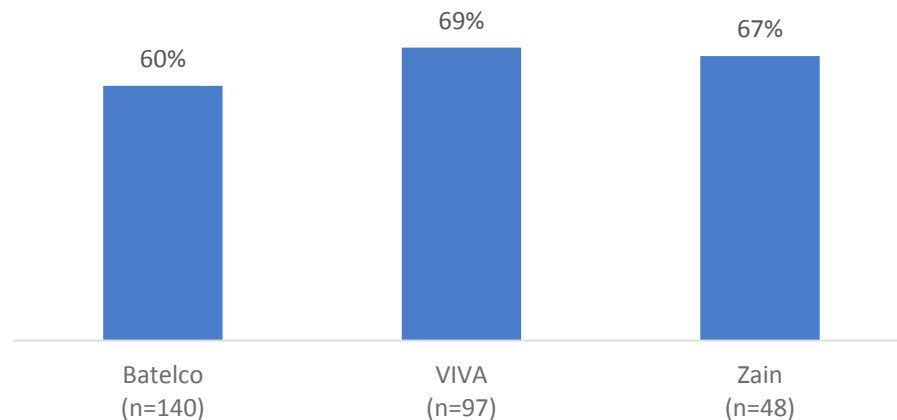
More Than Half Of Businesses Experienced Call Center In Past 6 Months

Overall

By provider



Base: All Respondents; 285

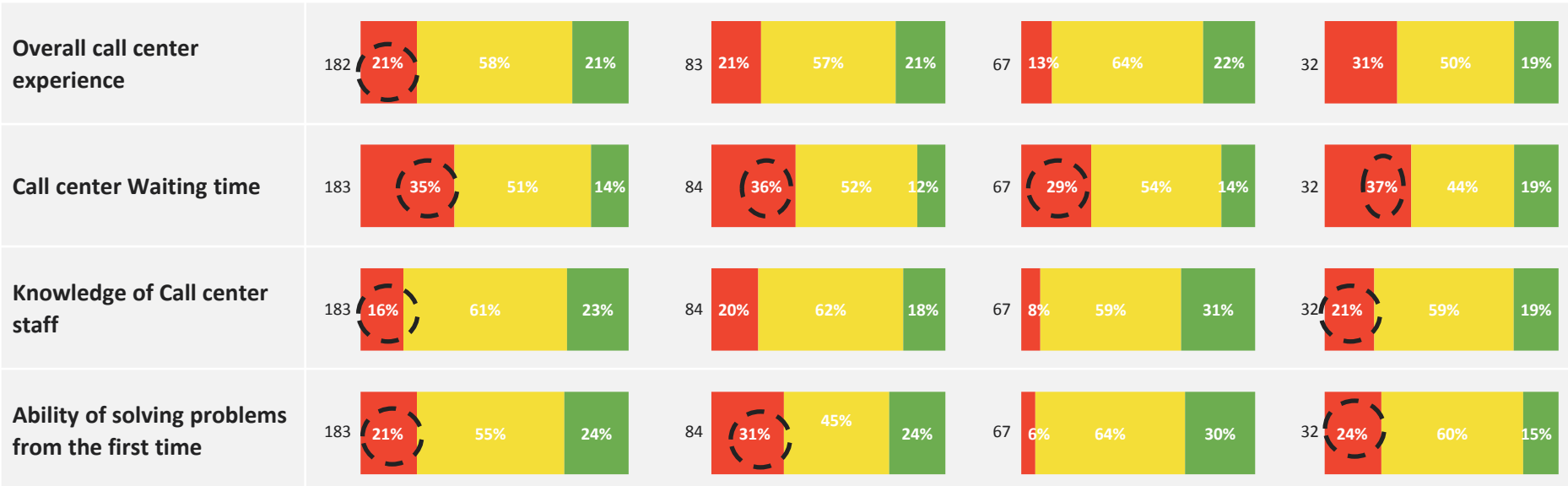


SATISFACTION OF PROVIDERS' BRANCHES

Businesses Found Their Experience With Call Center Average

➤ This satisfaction is decreased by the waiting time. More than one third of businesses suffered from it.

■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)





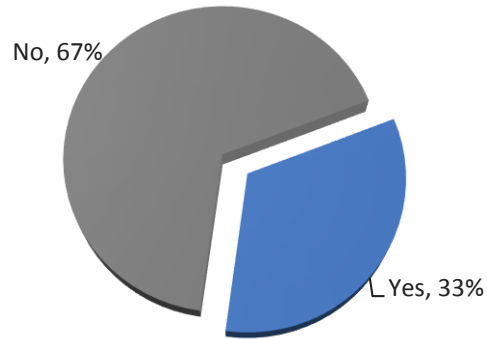
BUSINESSES' EXPERIENCE WITH MOBILE PROVIDERS' COMPLAINT HANDLING

SUBMITTING COMPLAINT TO PROVIDERS

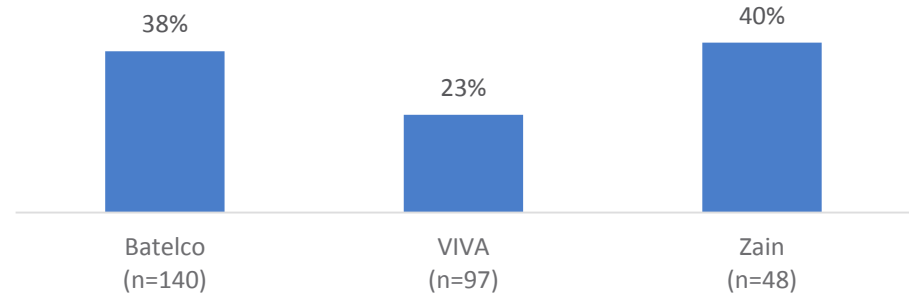
A Considerable number of Businesses Submitted Complaints To providers Before, around third of them.

Overall

By provider

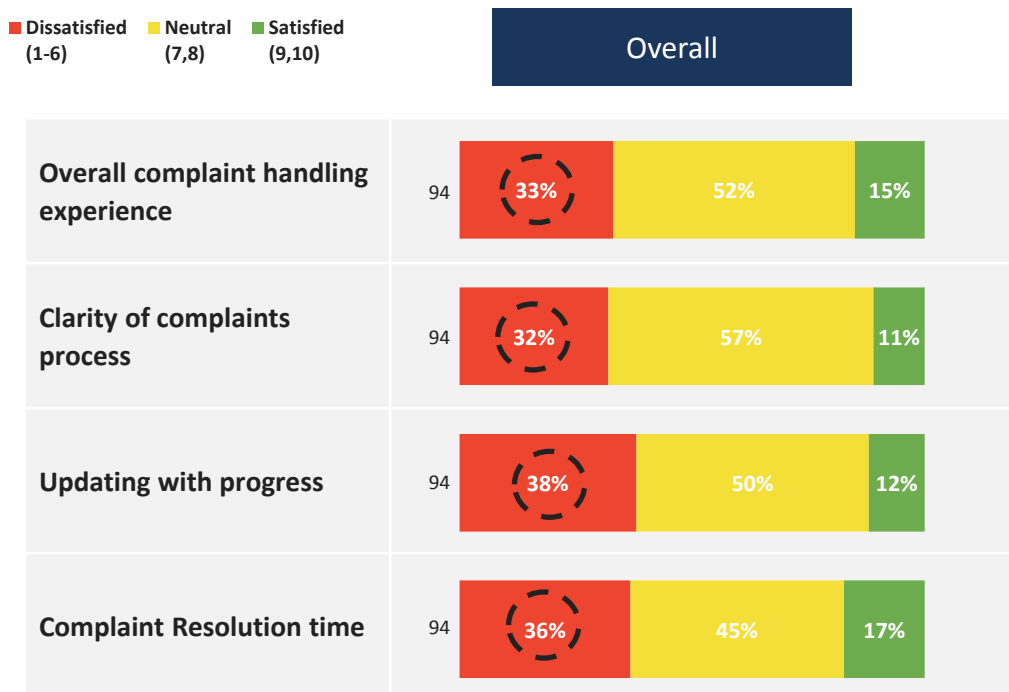


Base: All Respondents; 285



Handling Businesses' Complaints Was Dissatisfying

➤ Around one third of businesses were dissatisfied from the way of handling their complaints across all aspects.



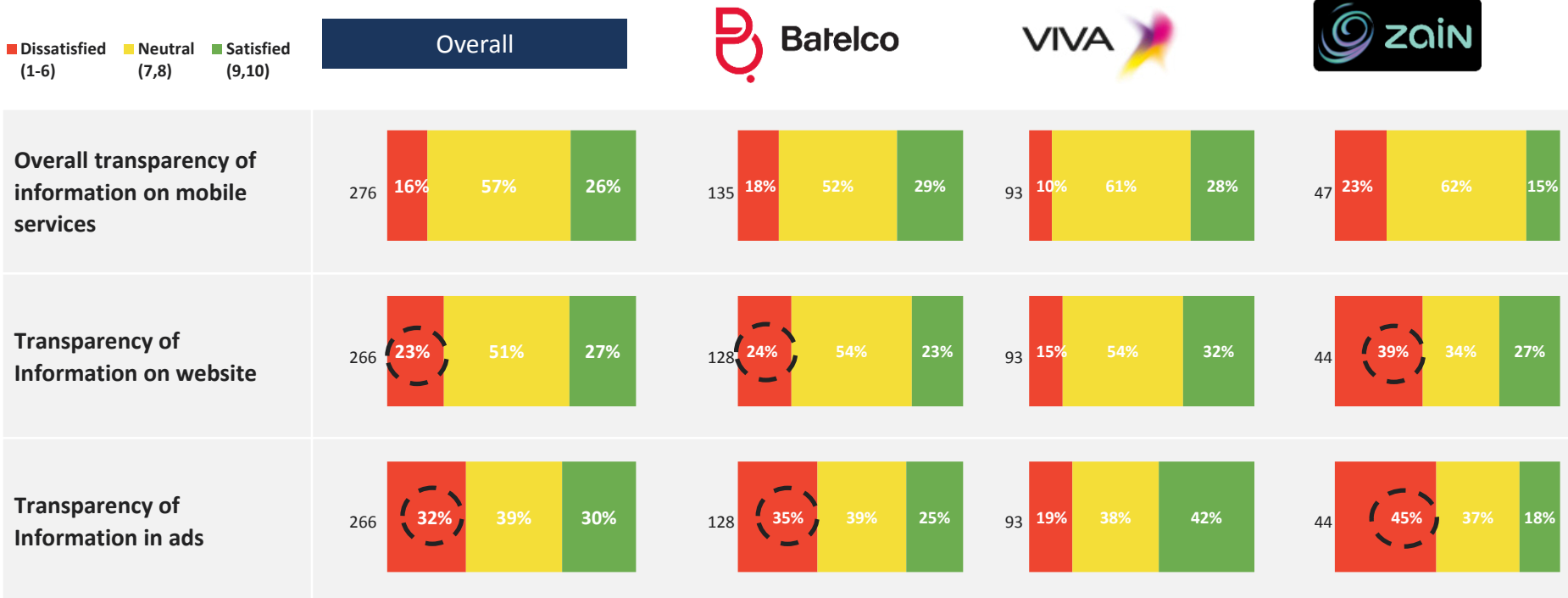
BUSINESSES' EXPERIENCE WITH MOBILE PROVIDERS' INFORMATION



SATISFACTION OF PROVIDERS' COMMUNICATION

Transparency Of Batelco & Zain Communication Ads Is Key Concern

➤ Business respondent fail to find the information they seek on providers' websites also; this is more true for Zain and Batelco subscribers than Viva.





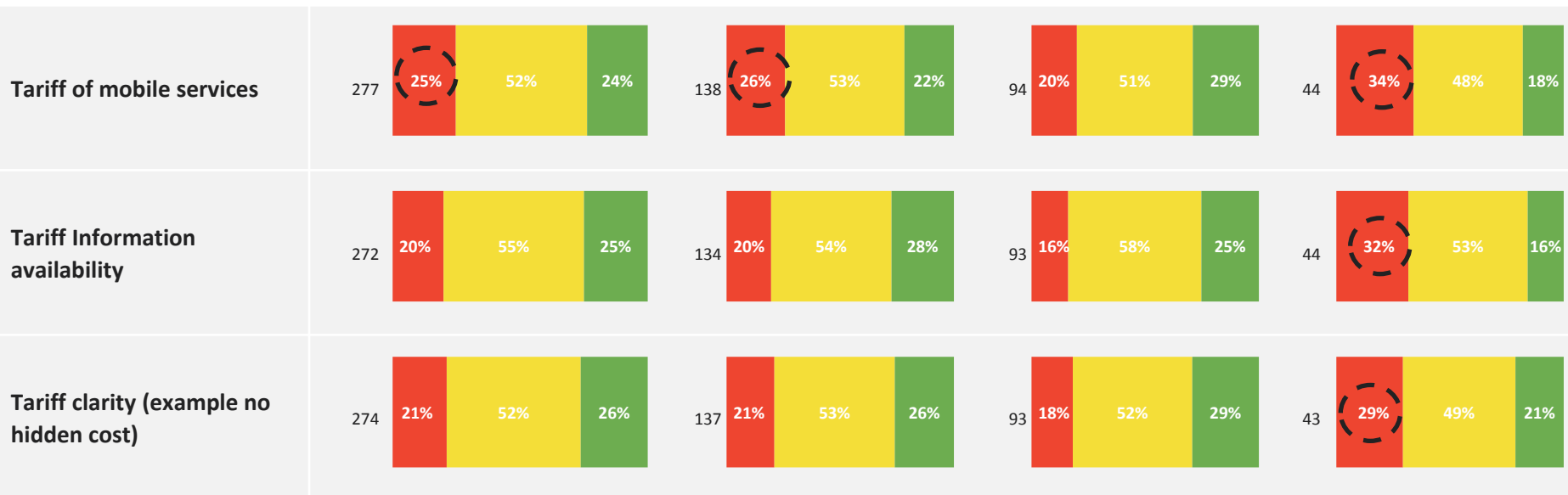
BUSINESSES' EXPERIENCE WITH MOBILE PROVIDERS' TARIFFS

Businesses Opinions Are Split Over Mobile Business Tariffs

- Businesses subscribing with Zain are significantly more dissatisfied from their business tariffs. This dissatisfaction came across all tariff aspects.

■ Dissatisfied (1-6)
■ Neutral (7,8)
■ Satisfied (9,10)

Overall



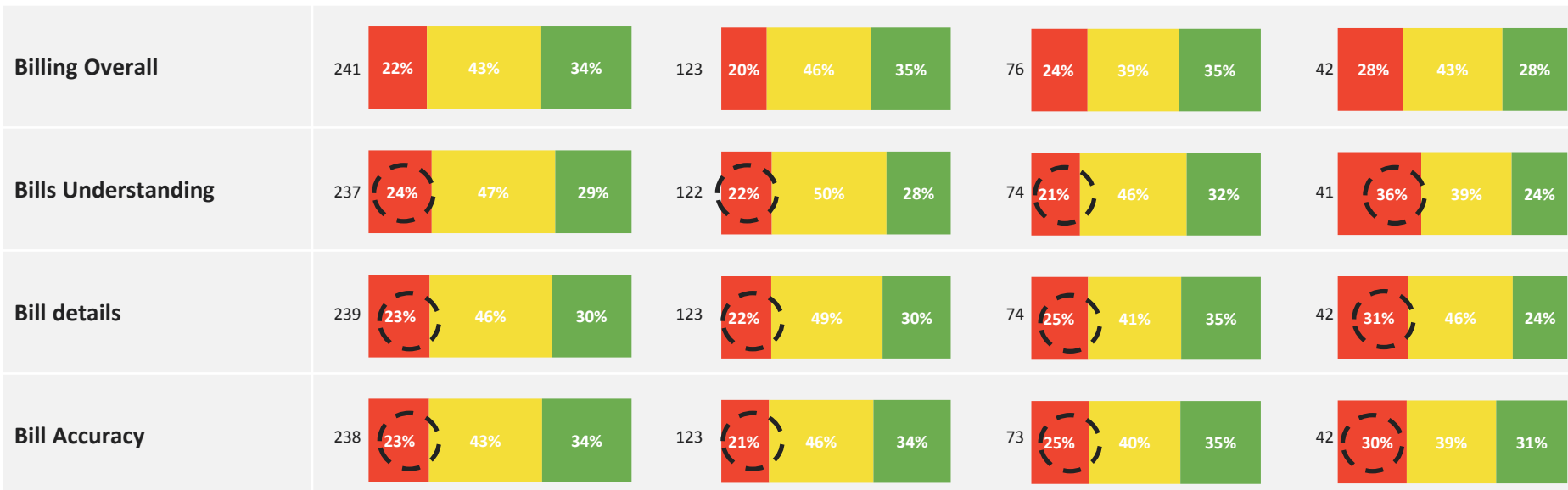
SATISFACTION OF BILLS | OVERALL

Bills More Satisfying Than Tariffs; Confusion Leads To Believe Of Inaccuracy

- Businesses subscribing with Zain are displeased with their bills more than other competitors; with their confusing bills that also lack details, leading to the suspicion of inaccuracies.

■ Dissatisfied (1-6)
■ Neutral (7,8)
■ Satisfied (9,10)

Overall





BUSINESSES' EXPERIENCE WITH MOBILE PROVIDERS' SERVICE AGREEMENT

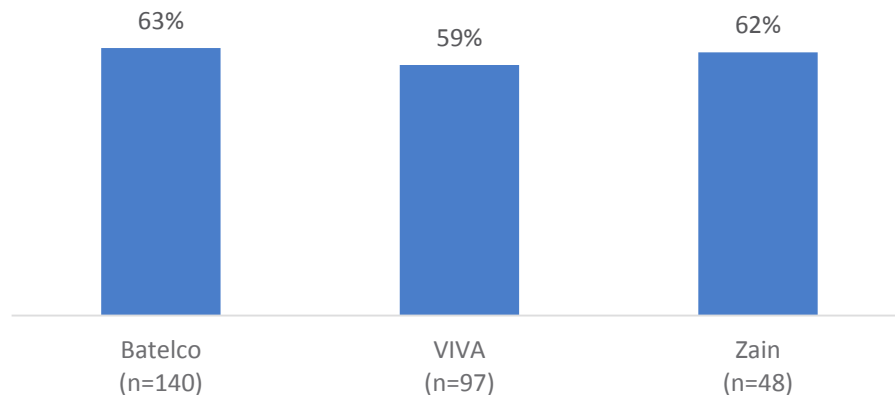
Over Half Of Businesses Reviewed Mobile Services Agreement Before Signing With providers

Overall



Base: All Respondents; 285

By provider



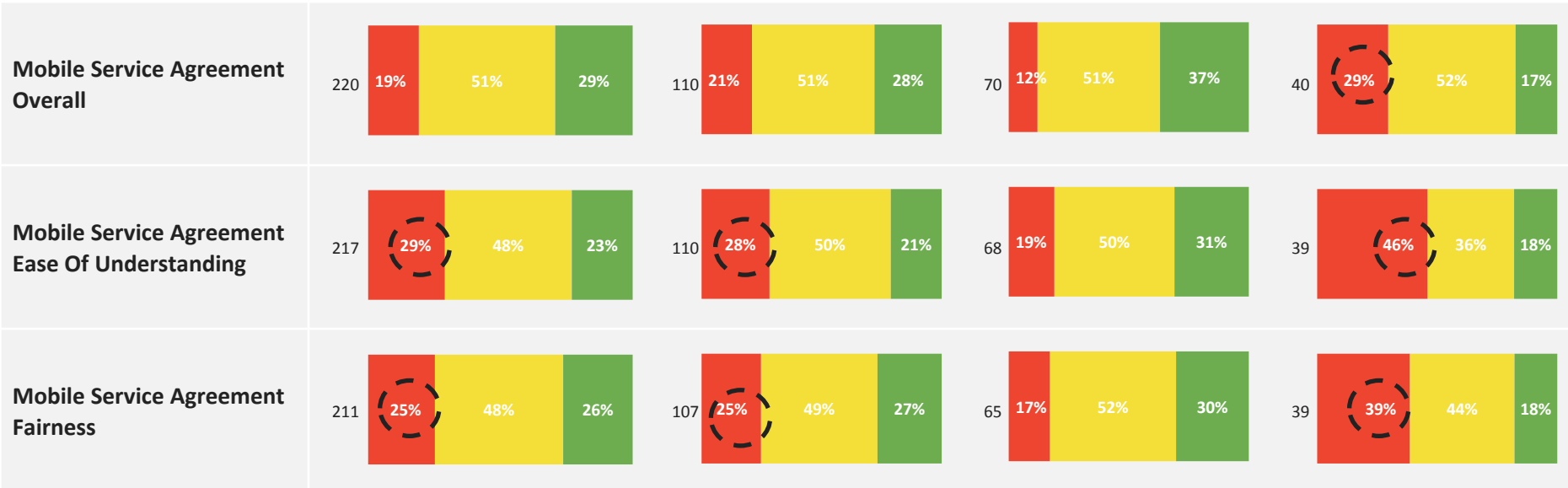
SATISFACTION OF SERVICE AGREEMENT | POSTPAID CUSTOMERS

Businesses Are Indifferent To The Signed Service Agreement

➤ Businesses subscribing with VIVA were more satisfied from the service agreement than other operators.

■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall

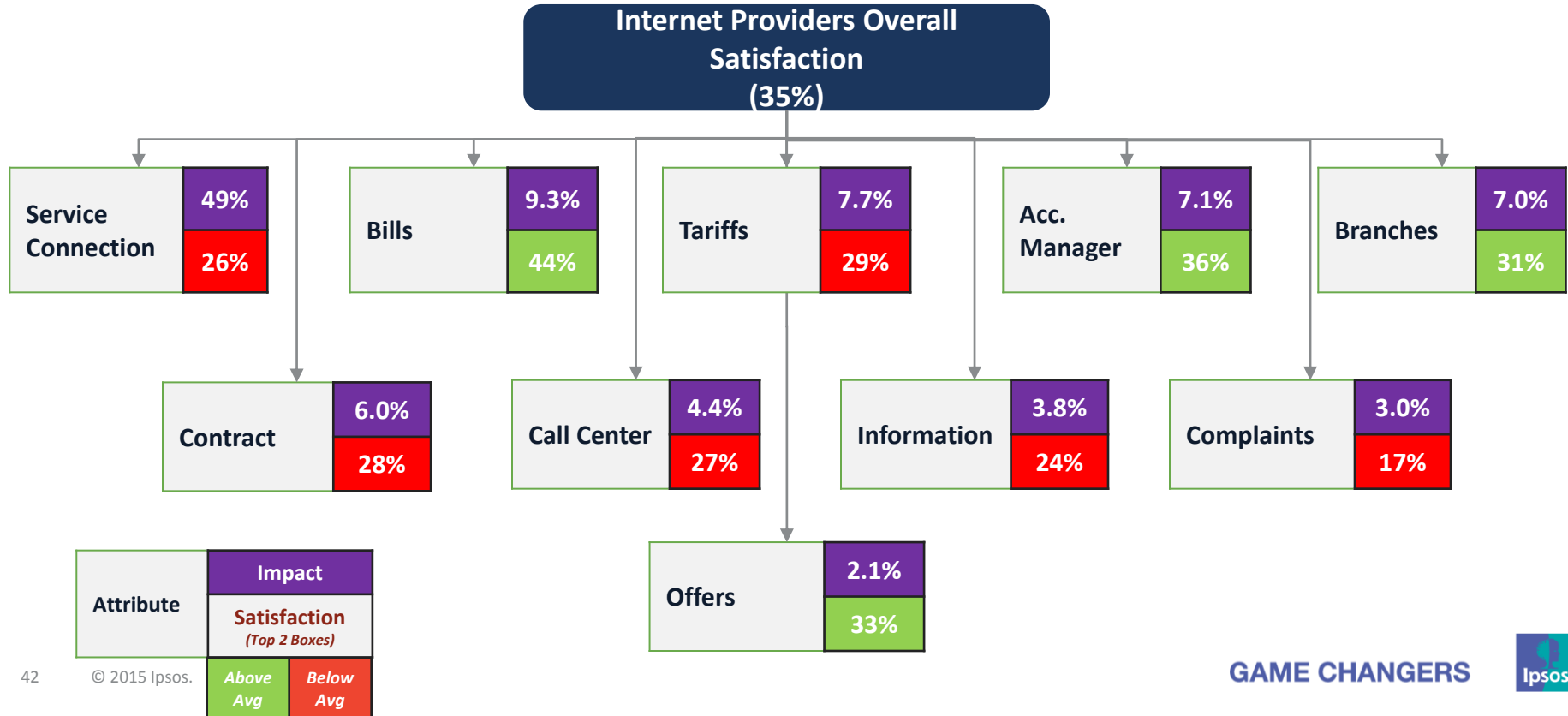


INTERNET

Summary Of Businesses' Experience With Internet providers

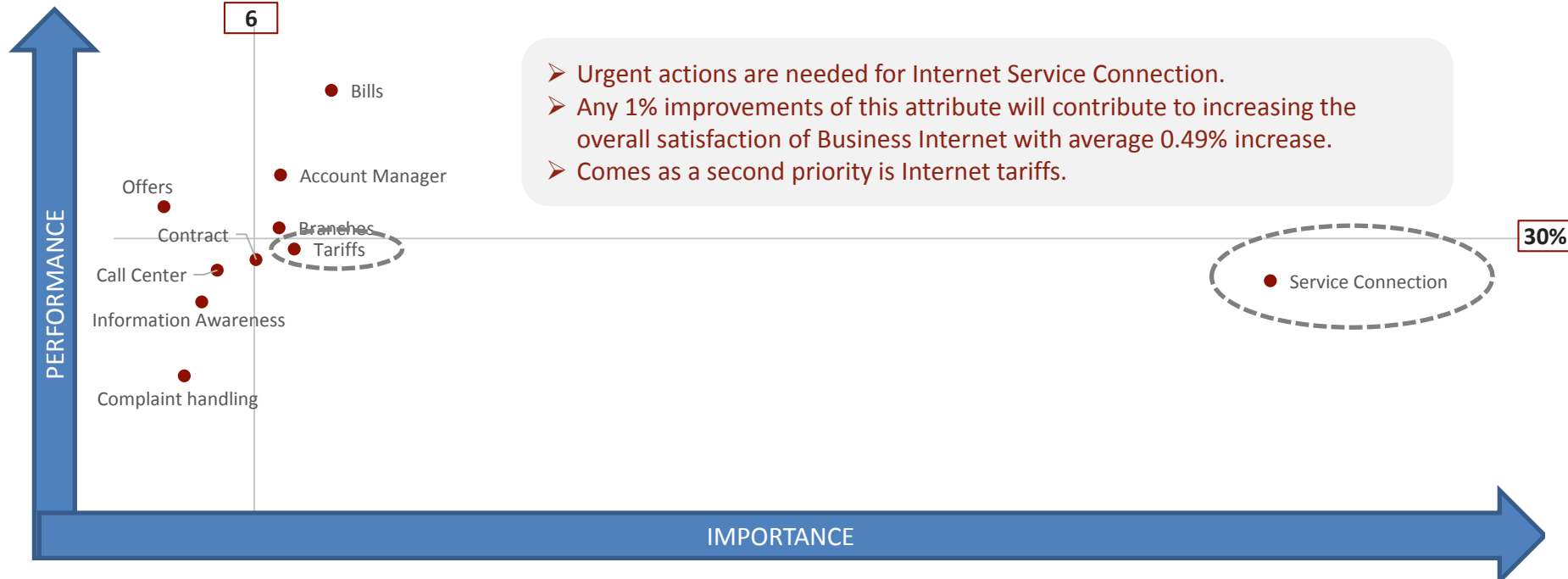
- On the overall level, businesses expressed high satisfaction level for their experience with Internet services. VIVA services are more satisfying than other competitors. This high satisfaction level of internet services is driven by large Businesses.
- Similar to Mobile market, businesses satisfaction was shifted when assessing detailed aspects.
- Businesses' satisfaction trend is driven by different experience touch points, mainly **Bills, Account Managers, Branches & Offers**.
- However, their experience bottlenecks is significantly coming across **service connection**. Businesses suffered from the **unreliable internet connection**. Further, **internet speed** is claimed to be very slow. Another dissatisfactory area for businesses is the **download threshold** imposed on their usage.
- Another challenges faced by businesses for their internet services were discovered in the areas of **Tariffs, Contract, Call Center, Information Transparency, & Complaint handling**. However, these areas remained with low impact on businesses overall satisfaction compared to the **Internet Service Connection**.

Internet Connection Stability Is The Key Challenge



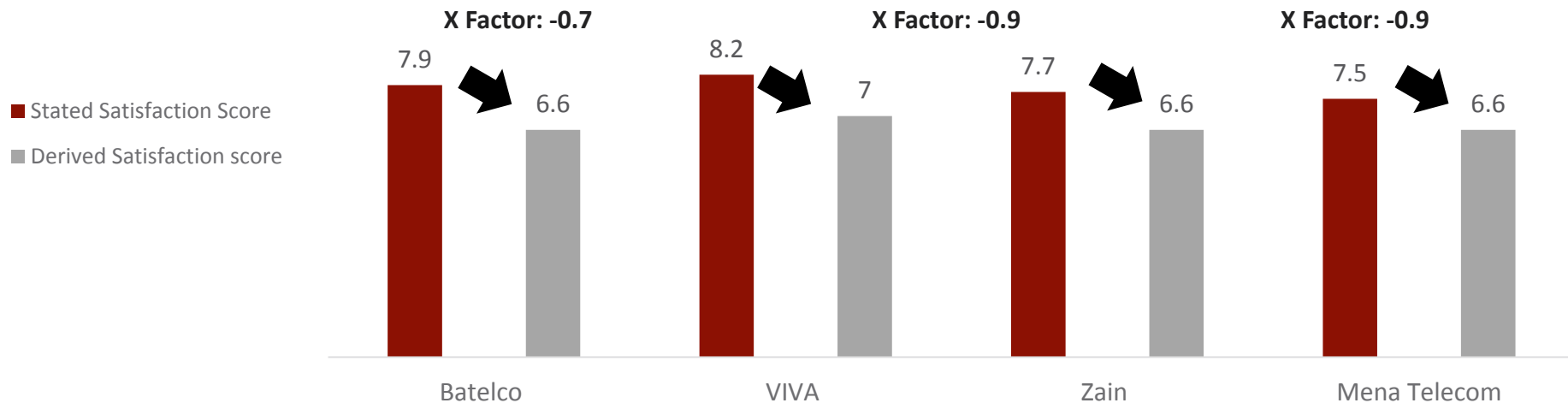
ACTION PLAN – IMPORTANCE VS. PERFORMANCE MATRIX

Internet Service Connection Is The Most Important Factor. Yet The Performance Is Below Average.



Businesses' Perception Of providers Is Increasing Their Satisfaction

- The relationship between Businesses & their providers is positively affecting the overall satisfaction score. Businesses are actually less satisfied from their experience of different functional touch points (Derived Satisfaction score), than what they expressed during the interview (stated satisfaction score). This **X Factor** is the impact of “**Brand Perception**” on the satisfaction score.



providers need to enhance their functional touch points to the actual satisfaction satisfaction score

What Are Improvements Needed Across Below Average Attributes?

Based on the action matrix and the current performance of the internet service connection, we recommend the following:

➤ Internet Service Connection

Businesses suffered from the internet service connection across all attributes, with the majority scoring in the neutral boxes. The below improvements are recommend:

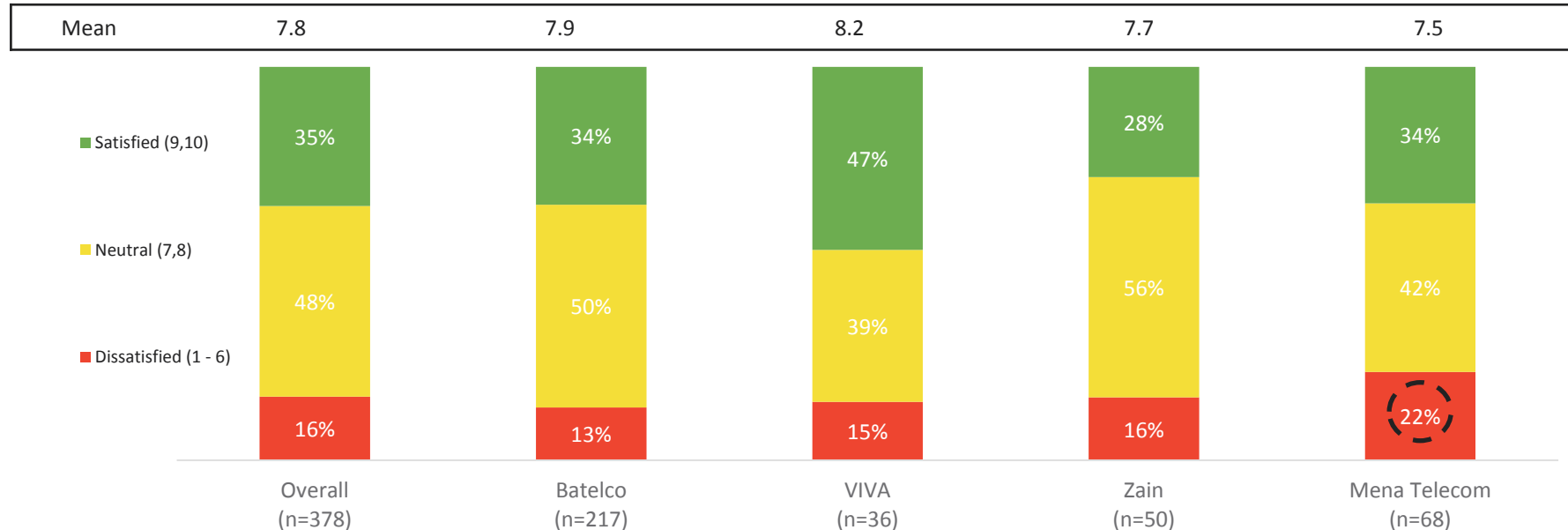
- providers should **enhance** the internet **connection speed** delivered to Businesses
- Ensure **providing a reliable** service **connection** without any disconnections
- **Increase** the **download threshold** and **limit** imposed on Business internet connections.

DETAILED FINDINGS OF BUSINESS INTERNET

OVERALL SATISFACTION OF INTERNET SERVICES

Businesses Are Highly Satisfied From Their Internet Services.

- The satisfaction varied across providers. However, they are all scoring close to each other on the mean score.
- VIVA is the best internet provider for businesses.

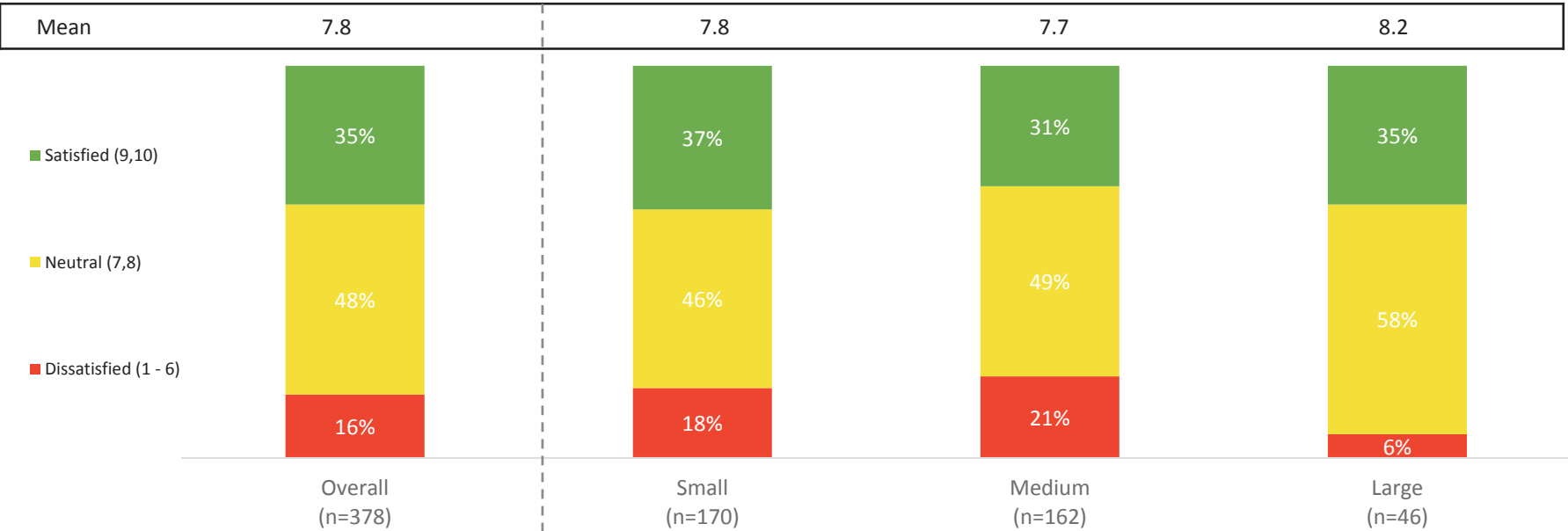


**LightSpeed service provider was excluded due to insufficient base*

OVERALL SATISFACTION OF INTERNET SERVICES BY COMPANY SIZE

On Average Satisfaction Of Internet Services Is Driven By Large Businesses

➤ Dissatisfaction from internet services is seen across Small & Medium businesses.



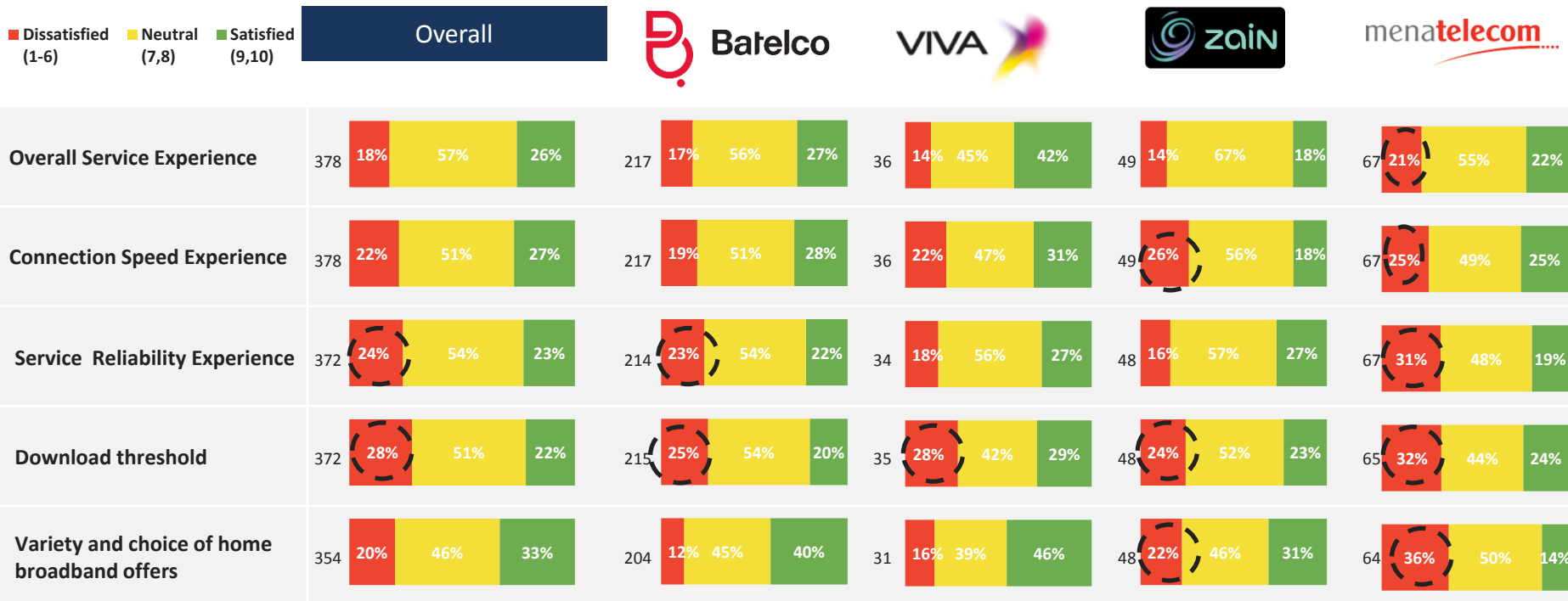



BUSINESSES' EXPERIENCE WITH INTERNET PROVIDERS' SERVICE AND NETWORK

SATISFACTION OF INTERNET ASPECTS

Businesses Satisfaction of Internet Aspects Shifted

➤ Main driver of dissatisfaction is the download threshold followed by internet reliability issues.



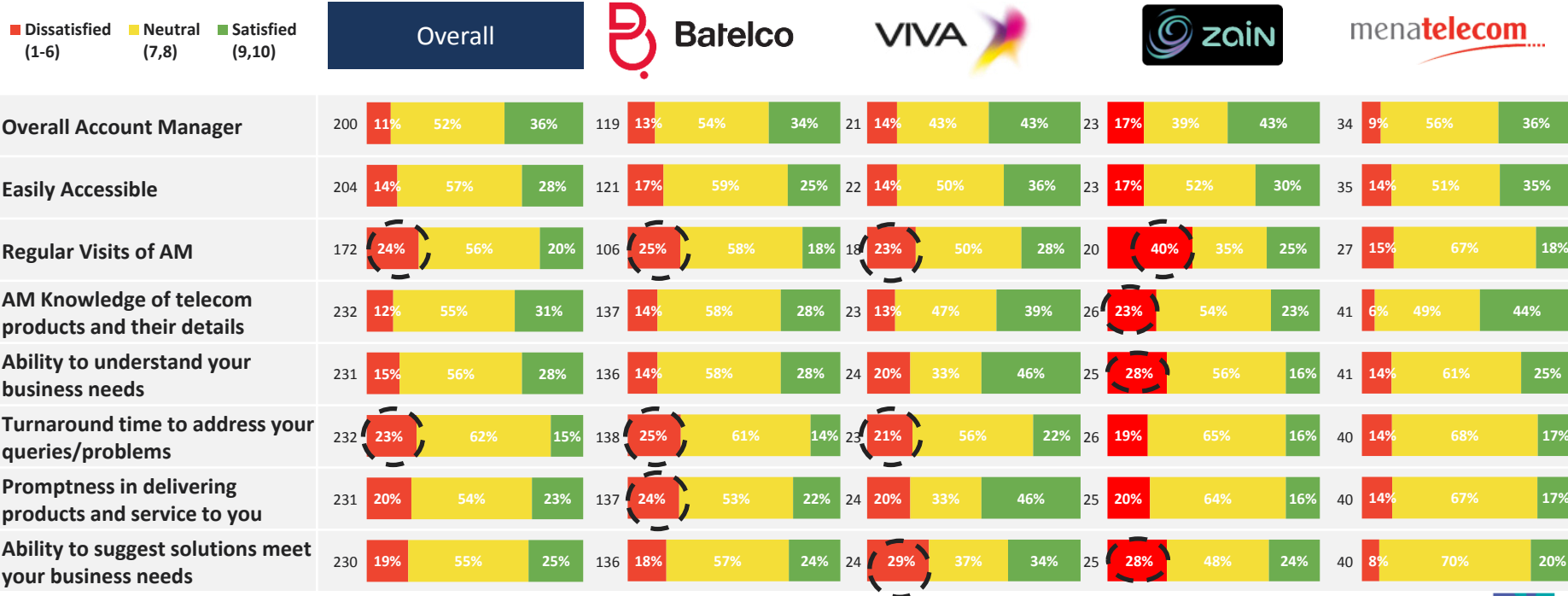


BUSINESSES' EXPERIENCE WITH INTERNET PROVIDERS' ACCOUNT MANAGERS

SATISFACTION OF PROVIDERS' ACCOUNT MANAGERS

Businesses Are Satisfied By providers' Account Managers

- Lots of attributes drove this satisfaction across providers.
- However, regular visits of Account Manager across most providers is a dissatisfaction area.





BUSINESSES' EXPERIENCE WITH INTERNET PROVIDERS' BRANCHES

Like Mobile Services, Waiting Time Is Key Dissatisfactory Aspect From Branches.

■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall



Batelco

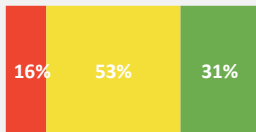
VIVA



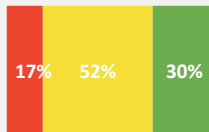
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Overall shop experience

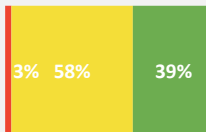
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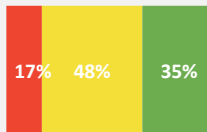
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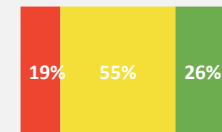
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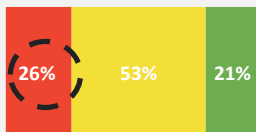


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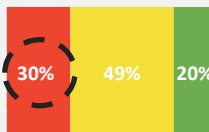


Shop Waiting time

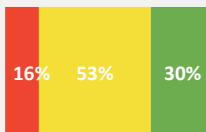
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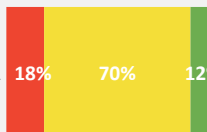
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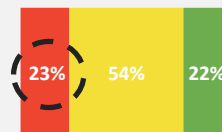
30



34

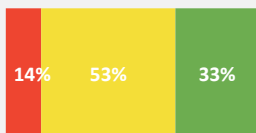


41

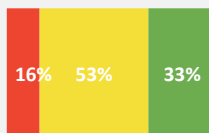


Knowledge of Store staff

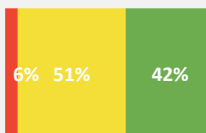
261



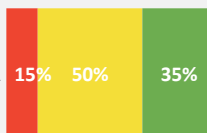
154



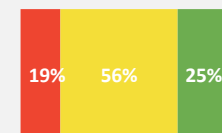
31



34



41





BUSINESSES' EXPERIENCE WITH INTERNET PROVIDERS' CALL CENTER

EXPERIENCING PROVIDERS' CALL CENTER IN PAST 6 MONTHS

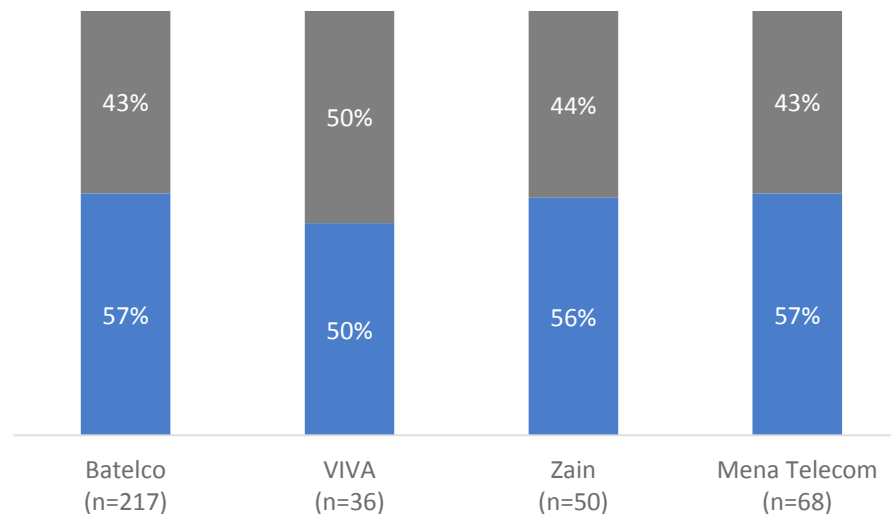
Over Half of Internet Subscribers Experienced Call Center

Overall



Base: All Respondents; 378

By provider



SATISFACTION OF PROVIDERS' CALL CENTER

Call Center Is A Key Dissatisfactory Area, Specially Waiting Time

➤ Secondary concern is Agent's inability to solve their problems from 1st time.

■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall

Batelco

VIVA

zain

menatelecom



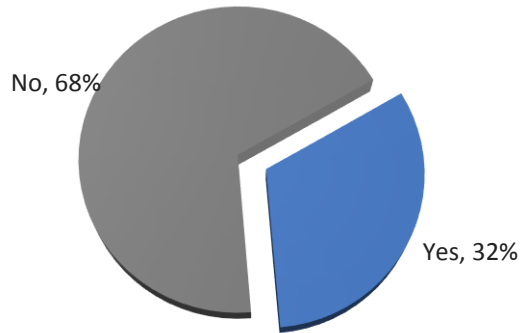


BUSINESSES' EXPERIENCE WITH INTERNET PROVIDERS' COMPLAINT HANDLING

SUBMITTING COMPLAINT TO PROVIDERS IN THE PAST 6 MONTHS

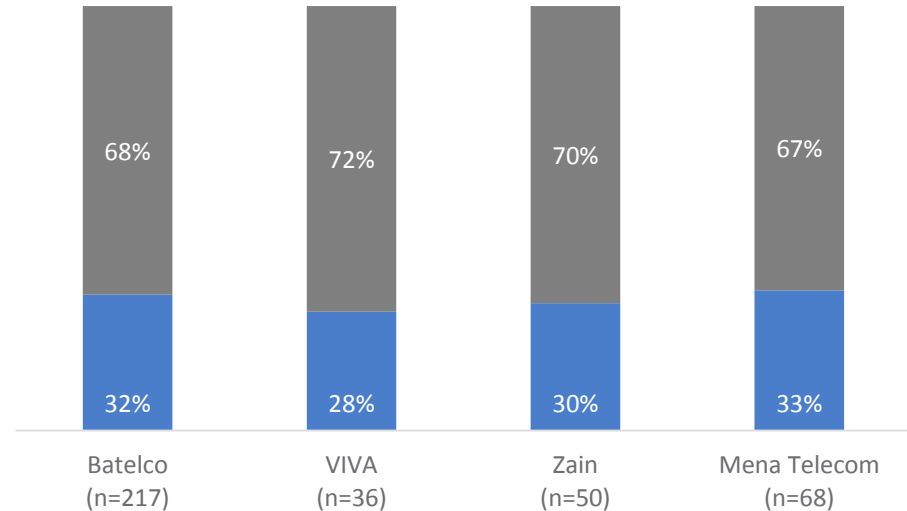
Similar To Mobile, Around A Third Of Businesses Submitted Complaints To Providers Concerning Their Internet Services.

Overall



Base: All Respondents; 378

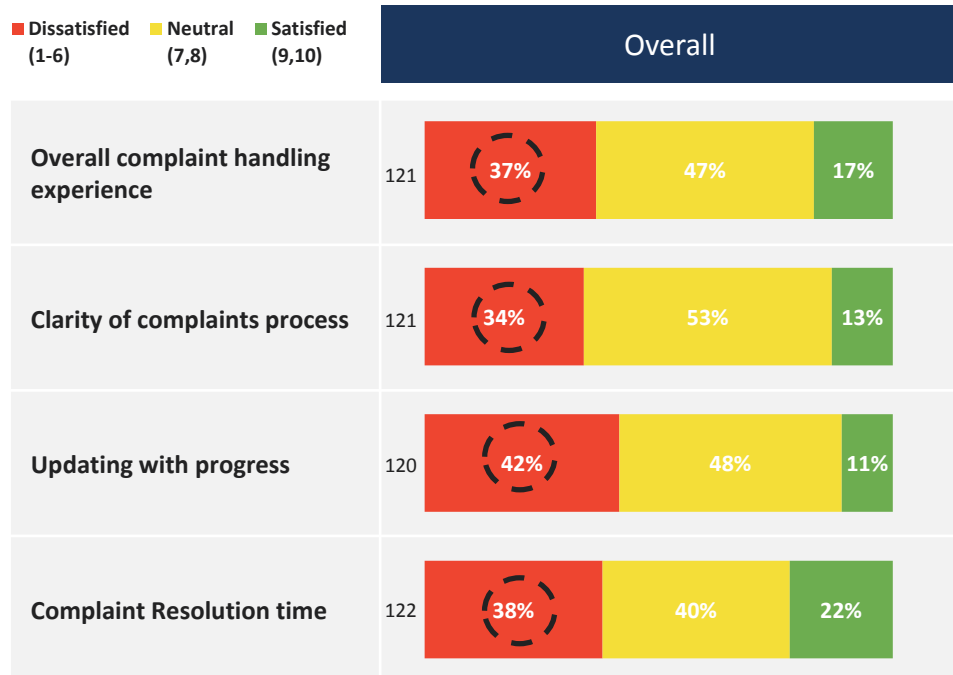
By provider



SATISFACTION OF COMPLAINT HANDLING

Dissatisfaction Trend Seen Across Who Submitted Complaints

- Complaint handling is a dissatisfactory experience on all aspects.



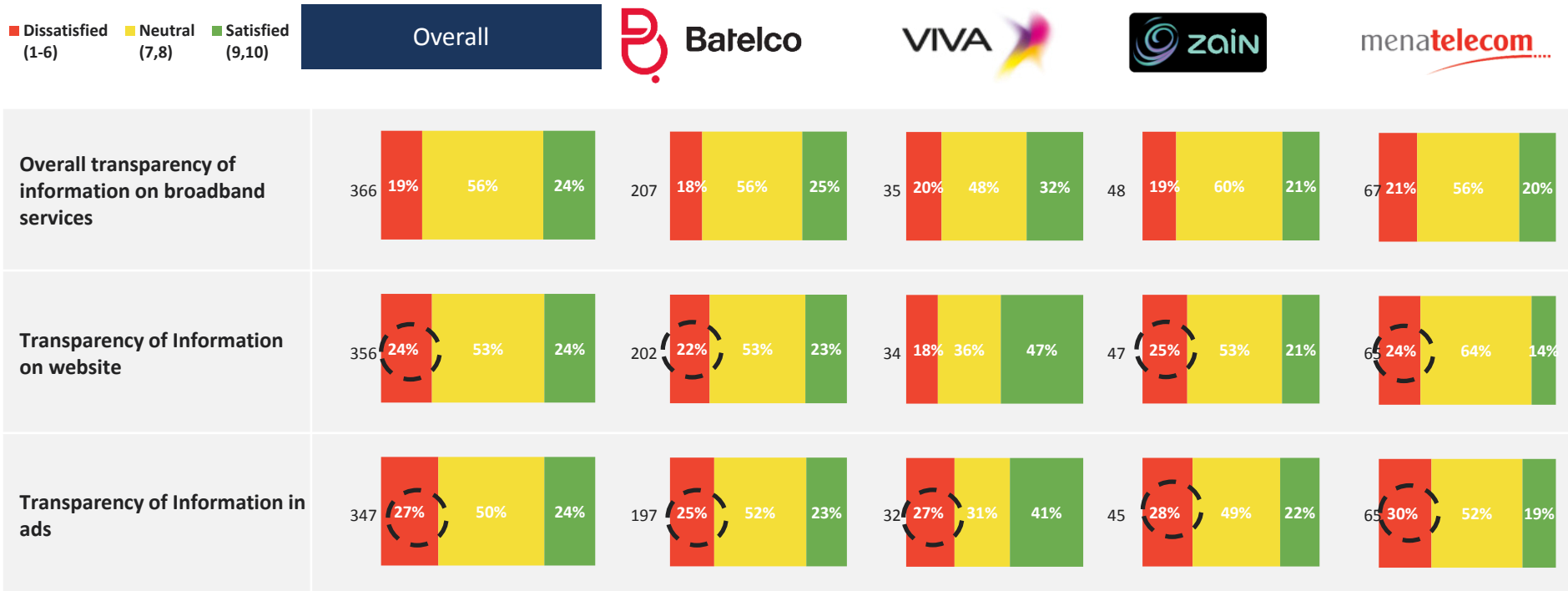
BUSINESSES' EXPERIENCE WITH INTERNET PROVIDERS' INFORMATION



SATISFACTION OF INTERNET INFORMATION PROVIDED BY PROVIDERS

VIVA Subscribers Are Most Satisfied With Its Communication

➤ Some businesses have doubts concerning the transparency of information provided in providers' ads.





BUSINESSES' EXPERIENCE WITH INTERNET PROVIDERS' TARIFFS

SATISFACTION OF INTERNET TARIFFS

Businesses Are Indifferent Towards providers' Internet Tariffs

➤ Viva subscribers are satisfied with their internet tariff, but other providers are faring worse.

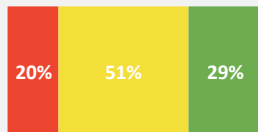
■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall

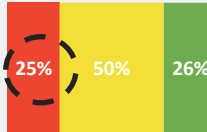


Tariff of Home Broadband services

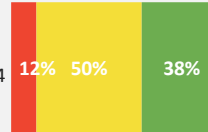
341



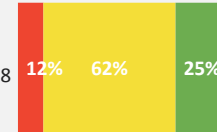
192



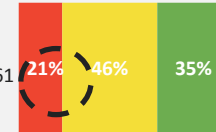
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48

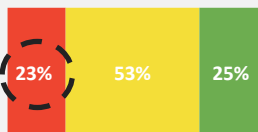


61

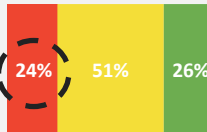


Tariff Information availability

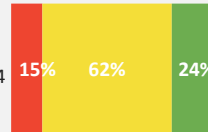
350



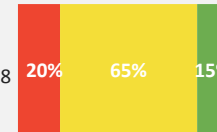
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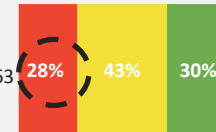
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48

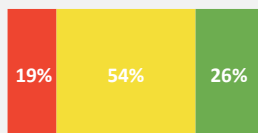


63

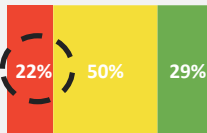


Tariff clarity (example no hidden cost)

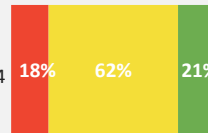
338



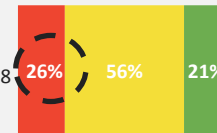
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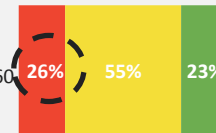
34



48



60



Most Businesses Are Satisfied With Their Bills

➤ Few voiced concerns regarding details and clarity of bills received

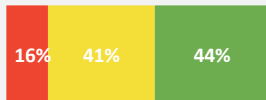
■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall

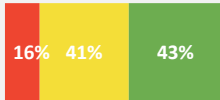


Bill Overall

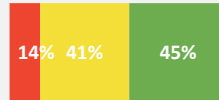
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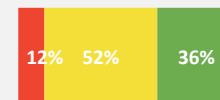
214



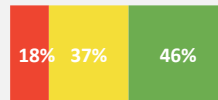
36



50

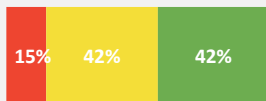


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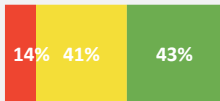


Bill Understanding

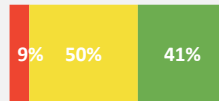
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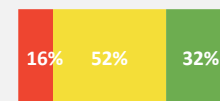
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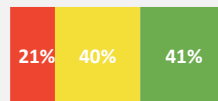
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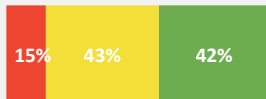


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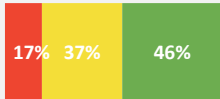


Bill Details

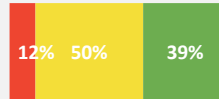
373



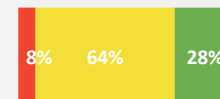
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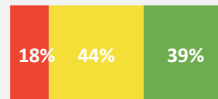
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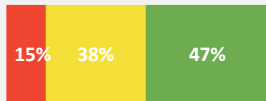


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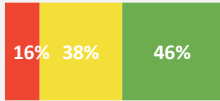


Bill Accuracy

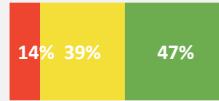
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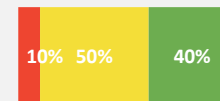
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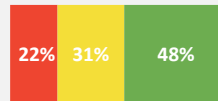
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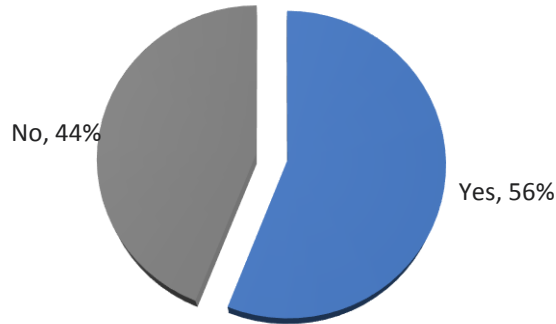




BUSINESSES' EXPERIENCE WITH INTERNET PROVIDERS' SERVICE AGREEMENT

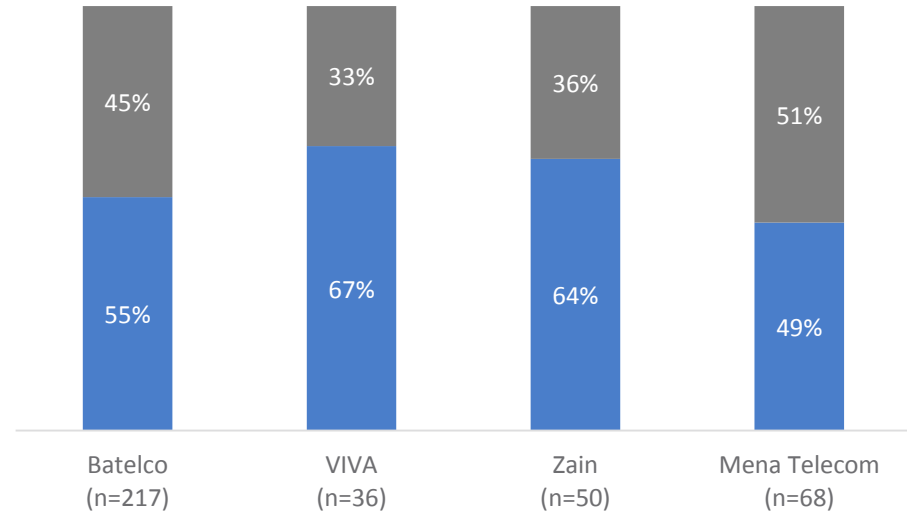
Over Half Of Internet Subscribers Have Read The Service Agreement Before Signature.

Overall



Base: All Respondents; 378

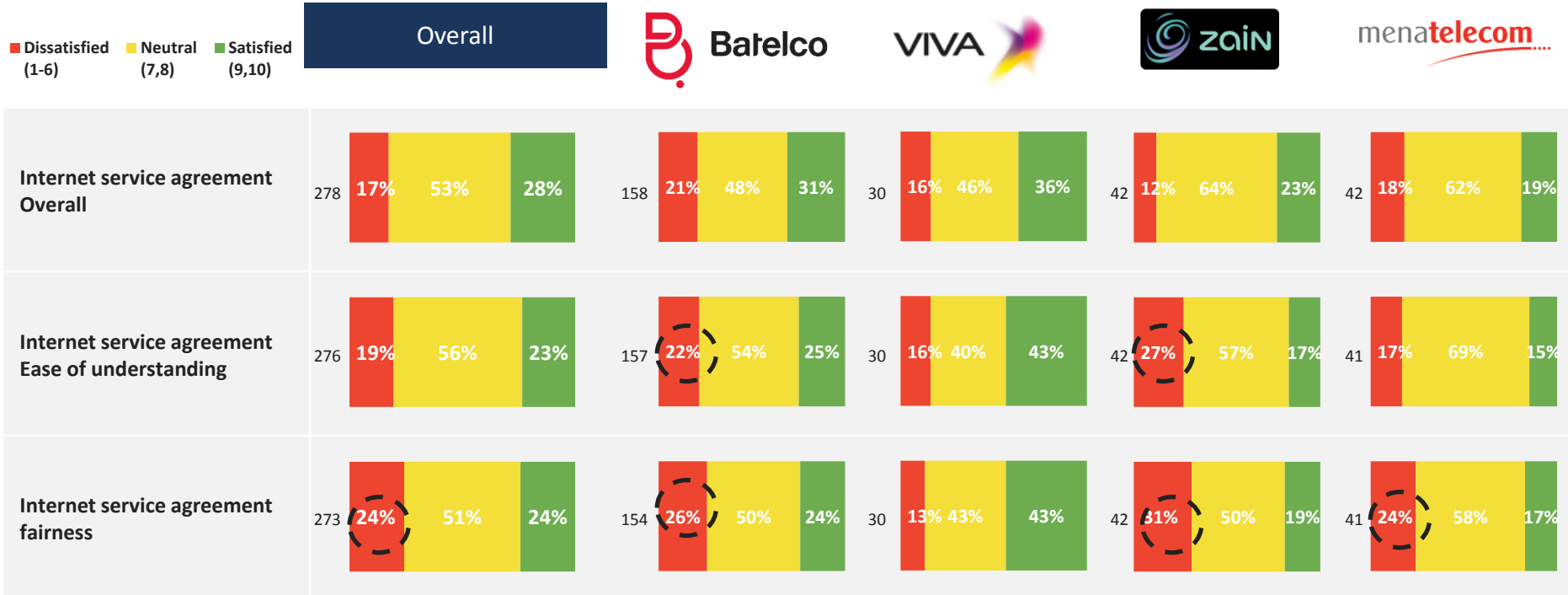
By provider



SATISFACTION OF SERVICE AGREEMENT

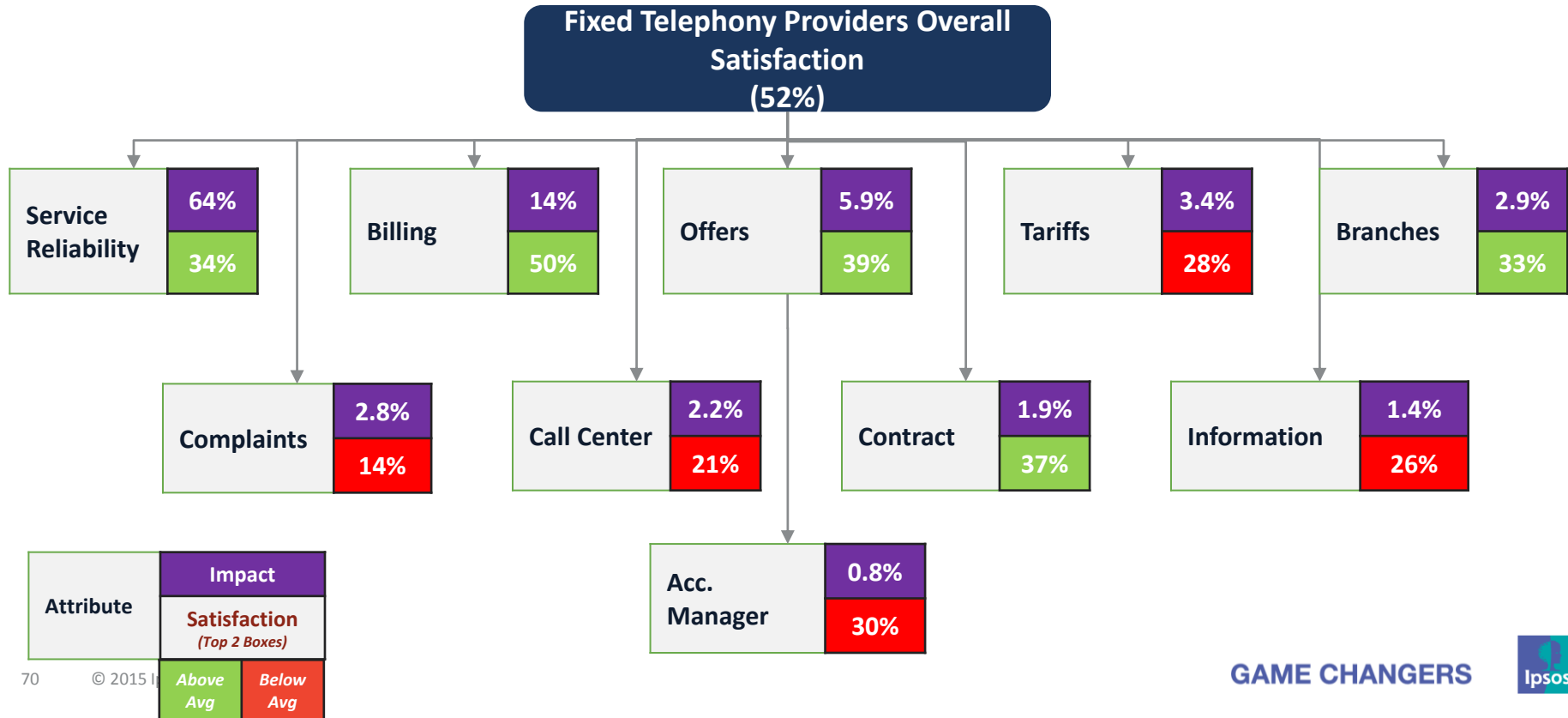
Similar To Mobiles, Businesses Are Indifferent To Signed Agreement

➤ Viva subscribers are highly satisfied with their service agreement.



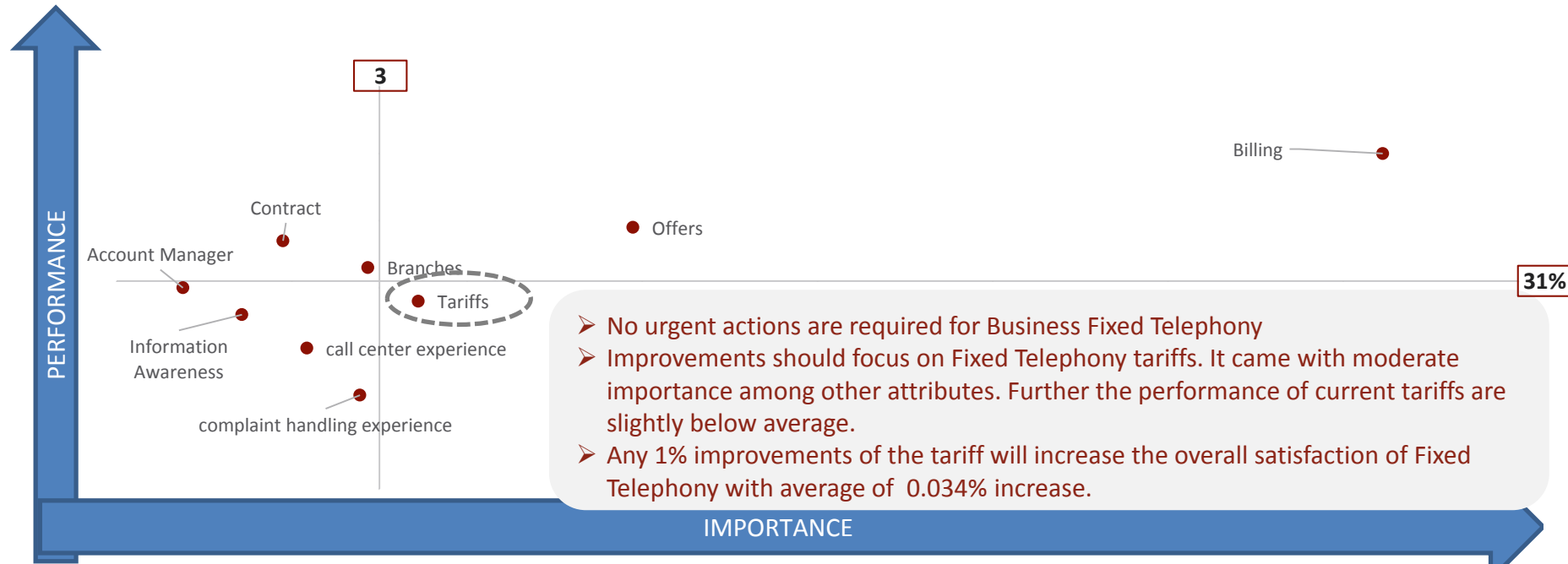
FIXED TELEPHONY

Fixed Telephony Tariffs Are Decreasing Customers' Satisfaction Score



ACTION PLAN – IMPORTANCE VS. PERFORMANCE MATRIX

In The Business Fixed Telephony Market, Actions Should Focus On Tariffs



**Service Connection came as the most important aspect which diluted results. It was excluded from the matrix to have proper action plan*

What Are Improvements Needed Across Below Average Attributes?

Based on the action matrix and the current performance level of Fixed Telephony Tariffs, we recommend the following:

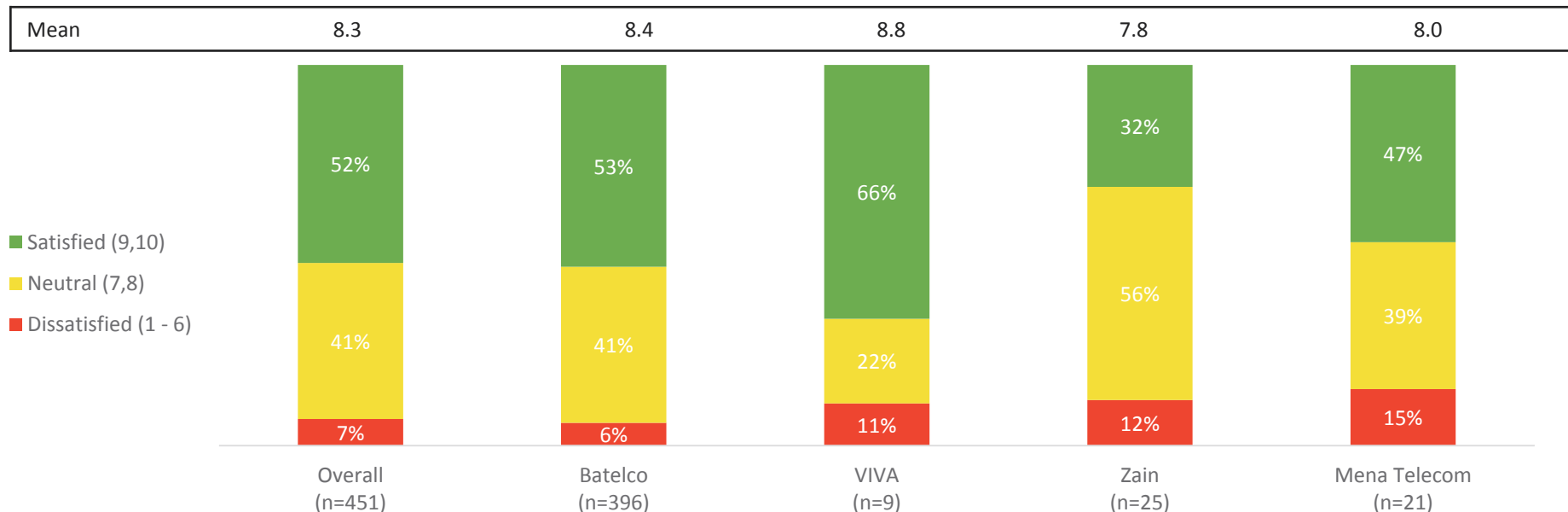
➤ Tariffs

- **Tariff Clarity Without Any Hidden Costs or Conditions** is the key focus for current tariff scheme. providers should clearly communicate all tariff details to customers. Any 1% improvements in this aspect will increase market overall satisfaction score by 0.034% average increase.

DETAILED FINDINGS OF FIXED TELEPHONY

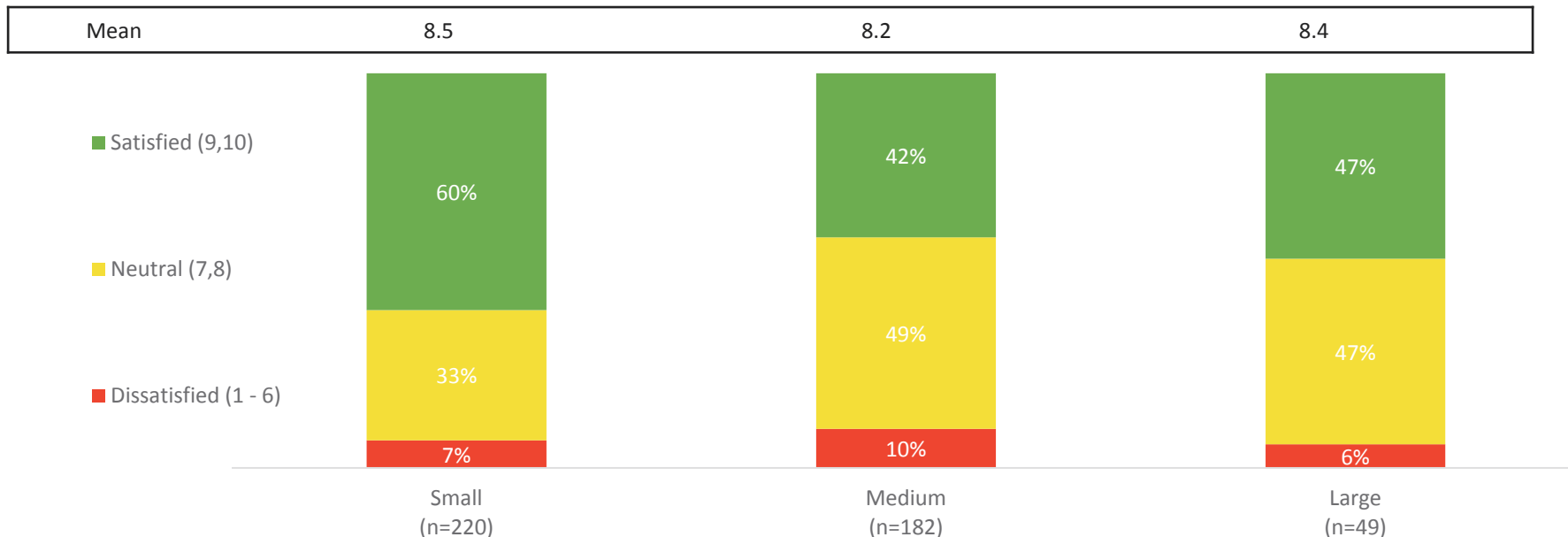
OVERALL SATISFACTION OF FIXED TELEPHONY SERVICES

Over Half Of Businesses Are Highly Satisfied From Their Experience With Fixed Telephony Services



OVERALL SATISFACTION OF FIXED TELEPHONY SERVICES BY COMPANY SIZE

The Satisfaction Is More Clear Among Small Businesses.



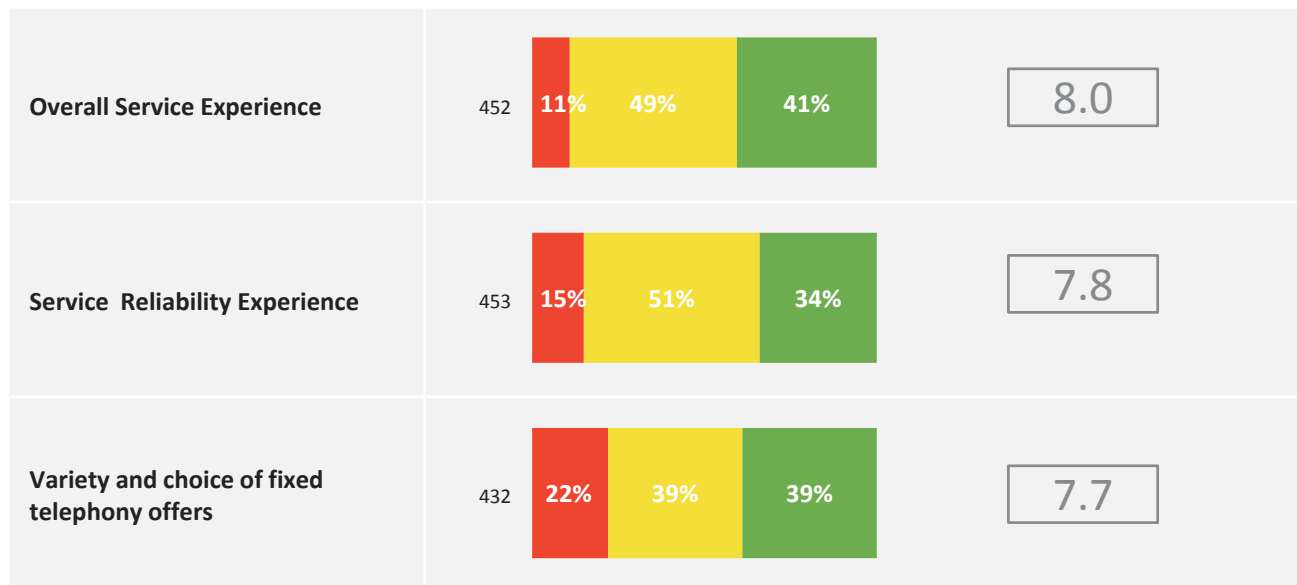
SATISFACTION OF FIXED TELEPHONY ASPECTS

Business Subscribers Are Satisfied With The Service Reliability Along With Offers Provided By providers

■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall

Avg.





BUSINESSES' EXPERIENCE WITH FIXED TELEPHONY PROVIDERS' ACCOUNT MANAGERS

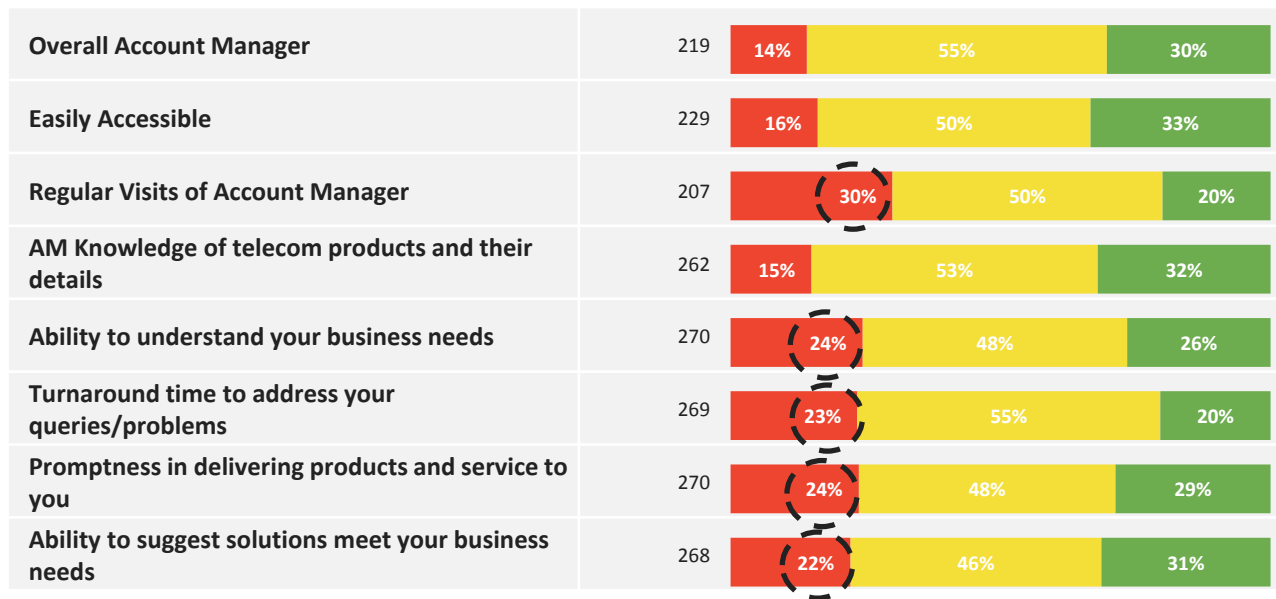
SATISFACTION OF PROVIDERS' ACCOUNT MANAGERS

Average Satisfaction From Account Managers

- Businesses had concerns about Account Managers, mainly on the regular visits. Improvements are needed also for their ability to understand business needs and time needed to address their queries.

■ Dissatisfied (1-6)
 ■ Neutral (7,8)
 ■ Satisfied (9,10)

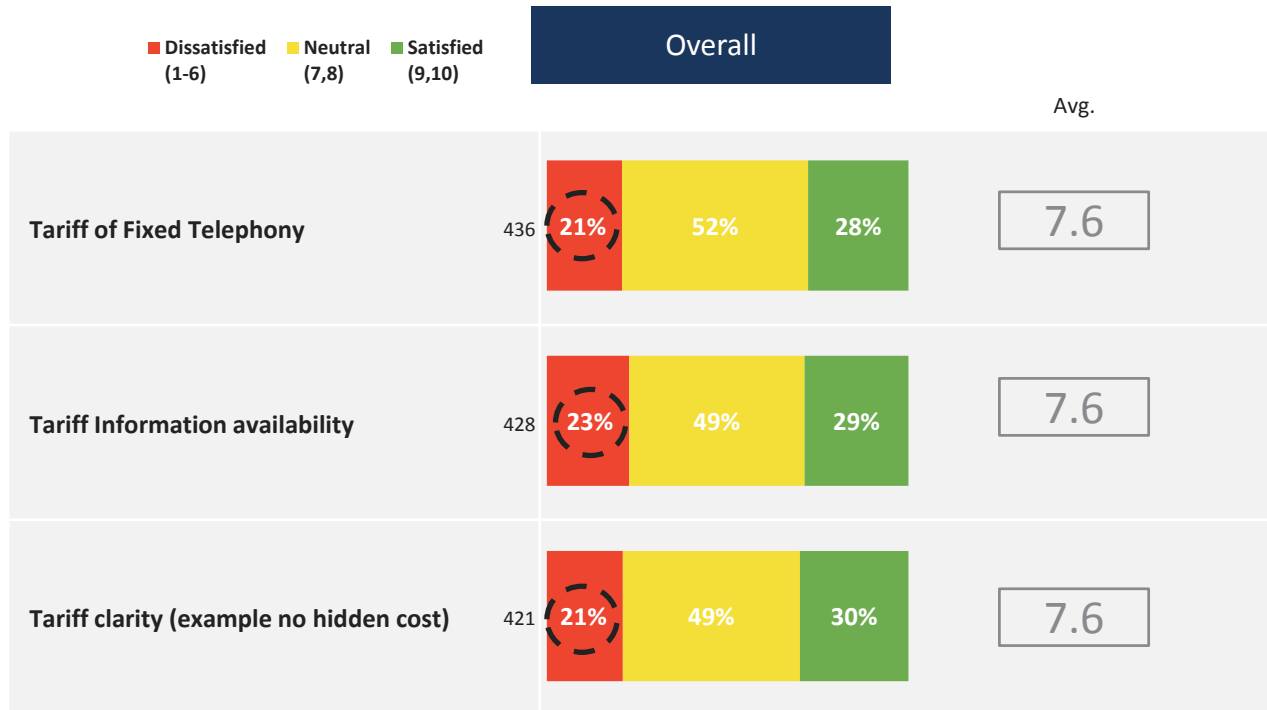
Overall



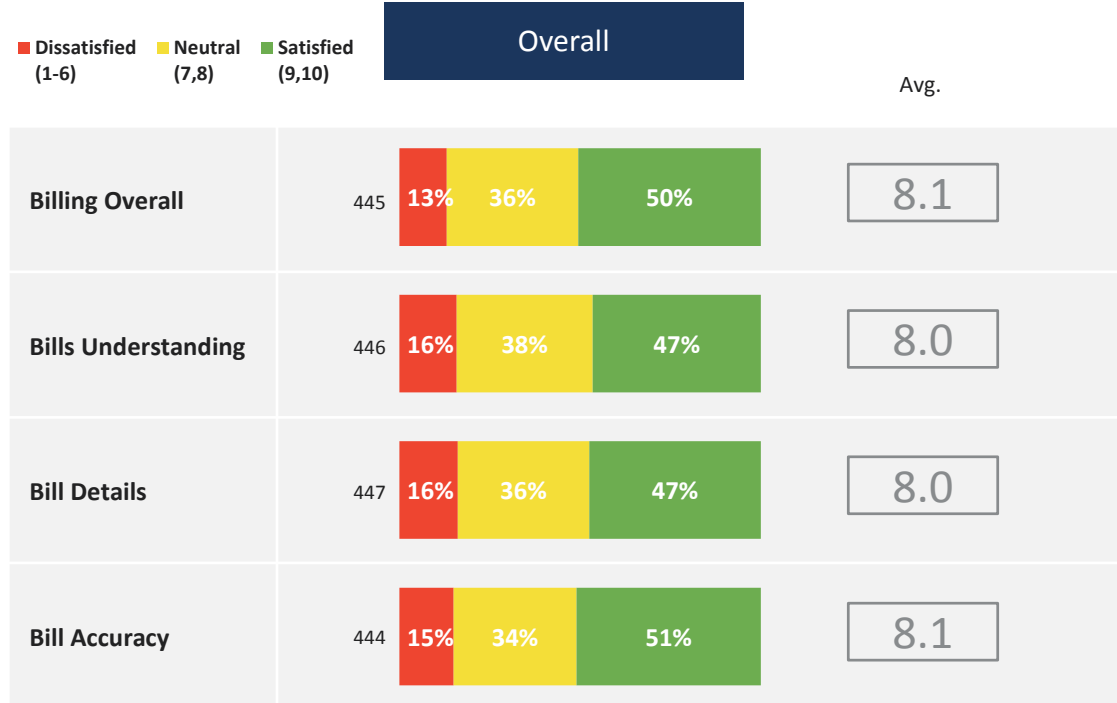
BUSINESSES' EXPERIENCE WITH FIXED TELEPHONY TARIFFS & BILLS

SATISFACTION OF FIXED TELEPHONY TARIFFS

Businesses Are Indifferent Towards Fixed Telephony Tariffs. Yet Some Are Dissatisfied



But Bills Are Satisfying Businesses



BUSINESSES' EXPERIENCE WITH FIXED TELEPHONY PROVIDERS' BRANCHES



SATISFACTION OF PROVIDERS' BRANCHES

Similarly To Mobile & Internet, Waiting Time Is A Dissatisfactory Aspect For Branch Experience.





BUSINESSES' EXPERIENCE WITH FIXED TELEPHONY PROVIDERS' CALL CENTER

EXPERIENCING PROVIDERS' CALL CENTER IN PAST 6 MONTHS

Almost Half of The Subscribers Have Called The Call Center. Their Experience Suffered From The Waiting Time & Resolution.

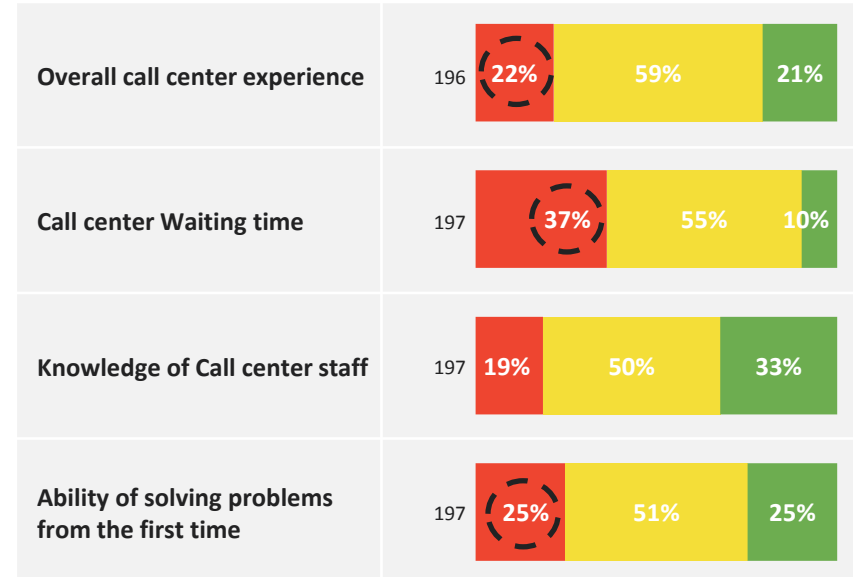
Overall



Base: All Respondents; 451

■ Dissatisfied (1-6)
 ■ Neutral (7,8)
 ■ Satisfied (9,10)

Overall



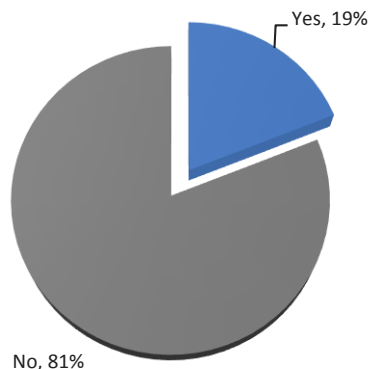


BUSINESSES' EXPERIENCE WITH FIXED TELEPHONY PROVIDERS' COMPLAINT HANDLING

SUBMITTING COMPLAINT TO PROVIDERS IN THE PAST 6 MONTHS

Few Subscribers Submitted Complaints Regarding Their Fixed Telephony Services. They Aren't Happy With The Whole Experience.

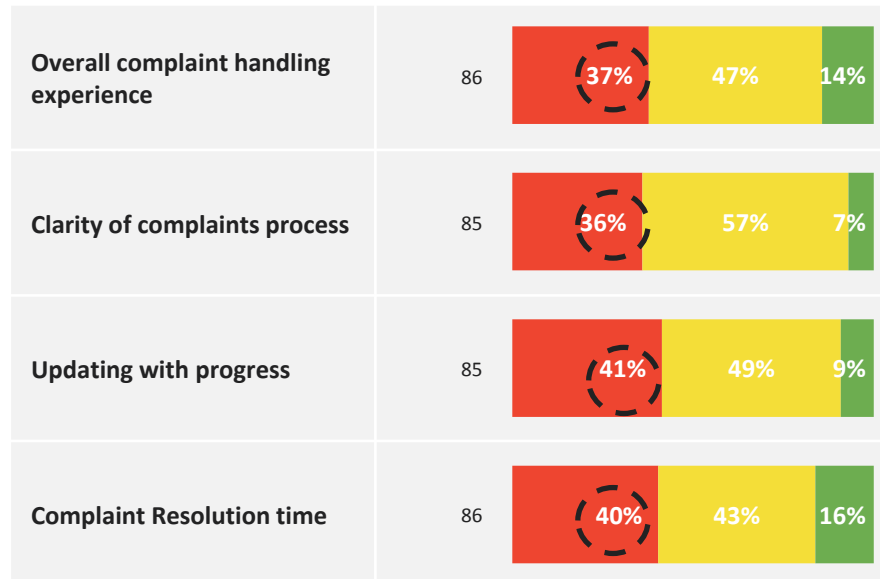
Overall



Base: All Respondents; 451

■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

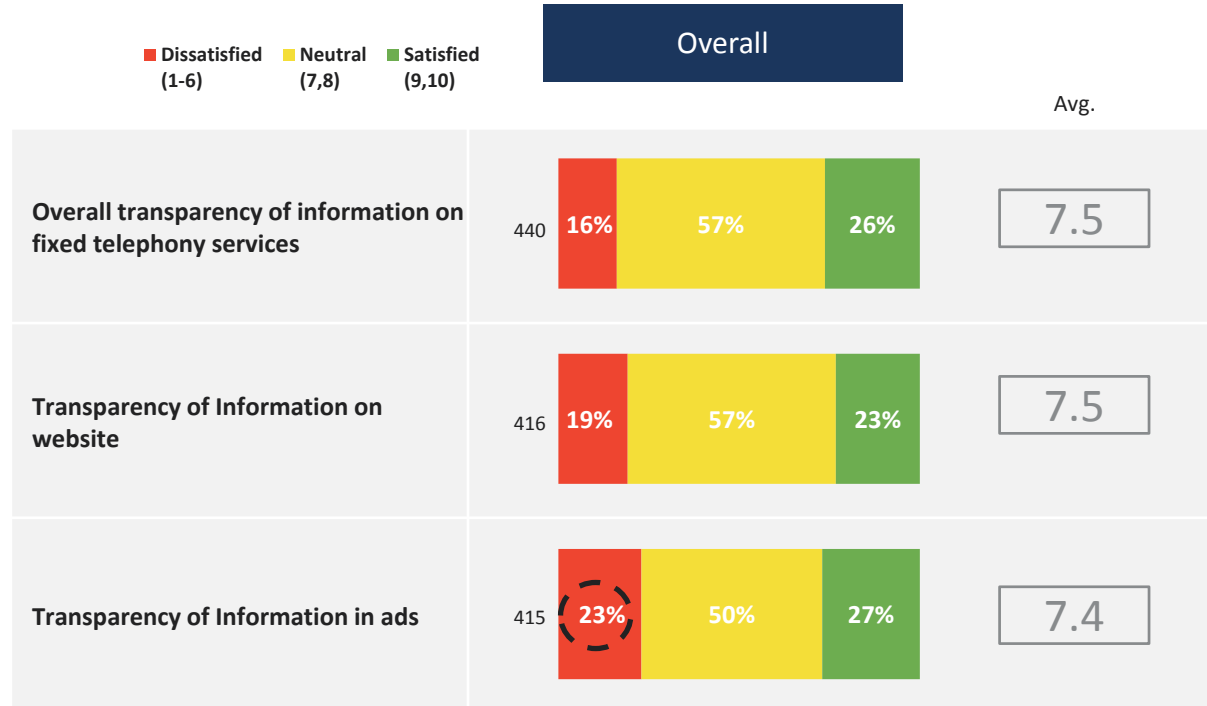
Overall



BUSINESSES' EXPERIENCE WITH FIXED TELEPHONY PROVIDERS' INFORMATION

SATISFACTION OF INFORMATION PROVIDED BY PROVIDERS

Transparency Of Fixed Telephony Services Is Average.



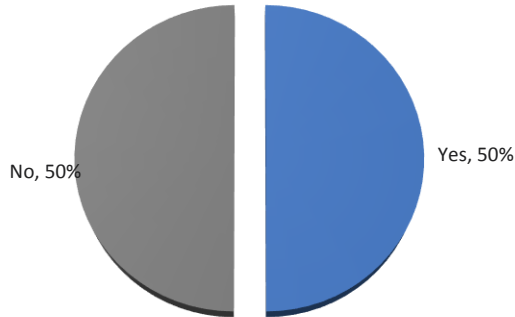


BUSINESSES' EXPERIENCE WITH FIXED TELEPHONY PROVIDERS' SERVICE AGREEMENT

Half Of The Subscribers Have Read The Fixed Telephony Contract.

➤ Split opinions on the fairness of the agreement

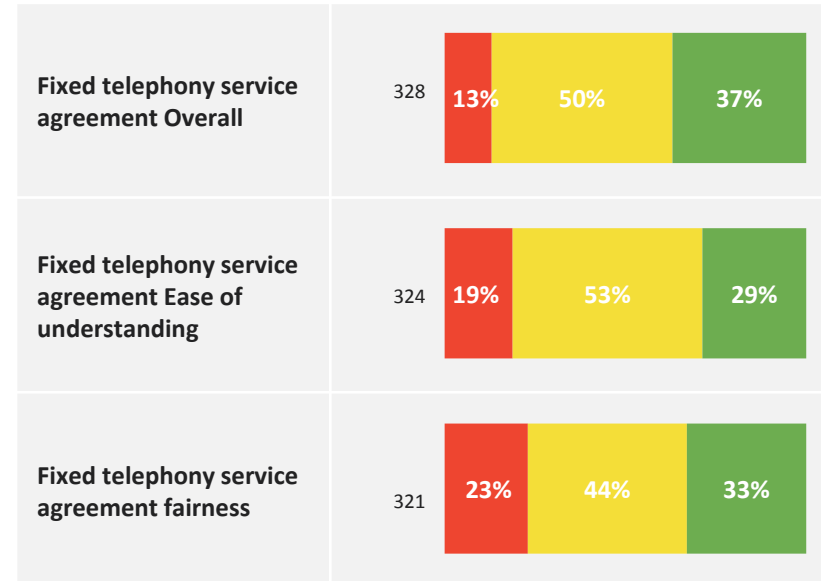
Overall



Base: All Respondents; 451

■ Dissatisfied (1-6)
 ■ Neutral (7,8)
 ■ Satisfied (9,10)

Overall



AWARENESS & PERCEPTIONS TOWARDS TRA BAHRAIN

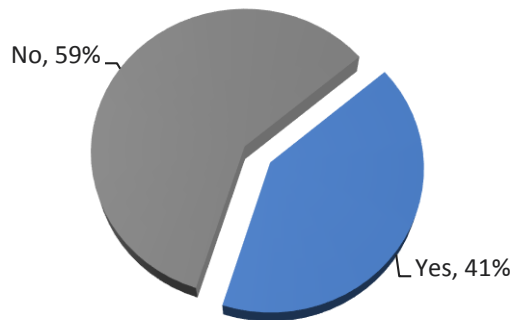
DETAILED FINDINGS OF TRA BAHRAIN

AWARENESS OF TRA OF BAHRAIN

More Than 40% Of Businesses Are Aware Of TRA Bahrain

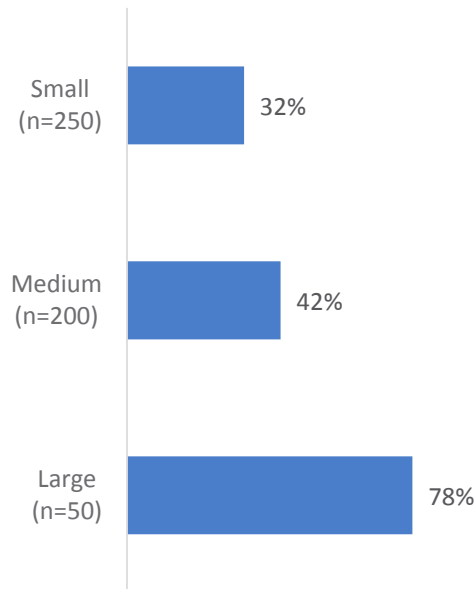
➤ Awareness of TRA Bahrain varied across businesses. Large Businesses have significantly higher awareness level than Small & Medium Businesses.

Overall Awareness of TRA of Bahrain



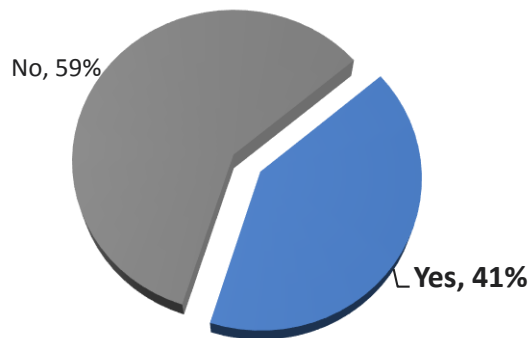
Base: All Respondents; 500

By Business Size



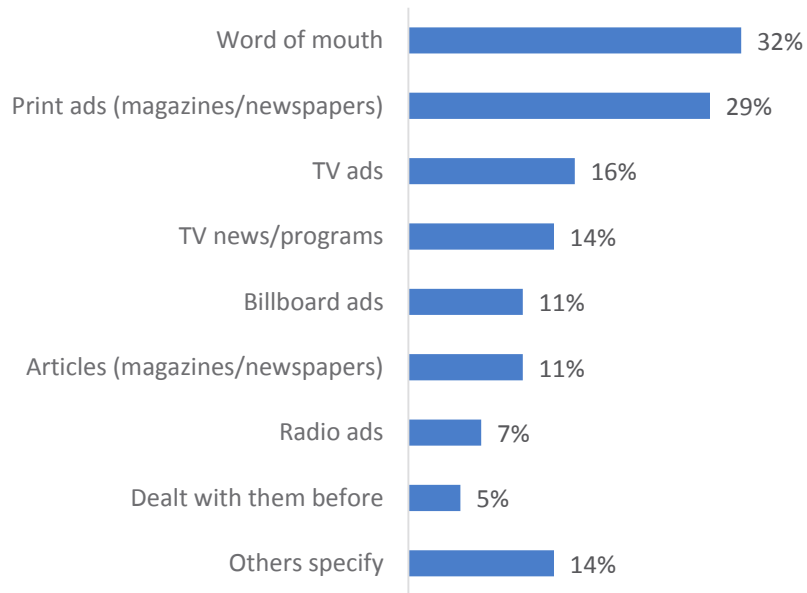
Word Of Mouth And Print Ads Are Key Sources Of Awareness For TRA Bahrain Across Businesses.

Overall Awareness of TRA of Bahrain



Base: All Respondents; 500

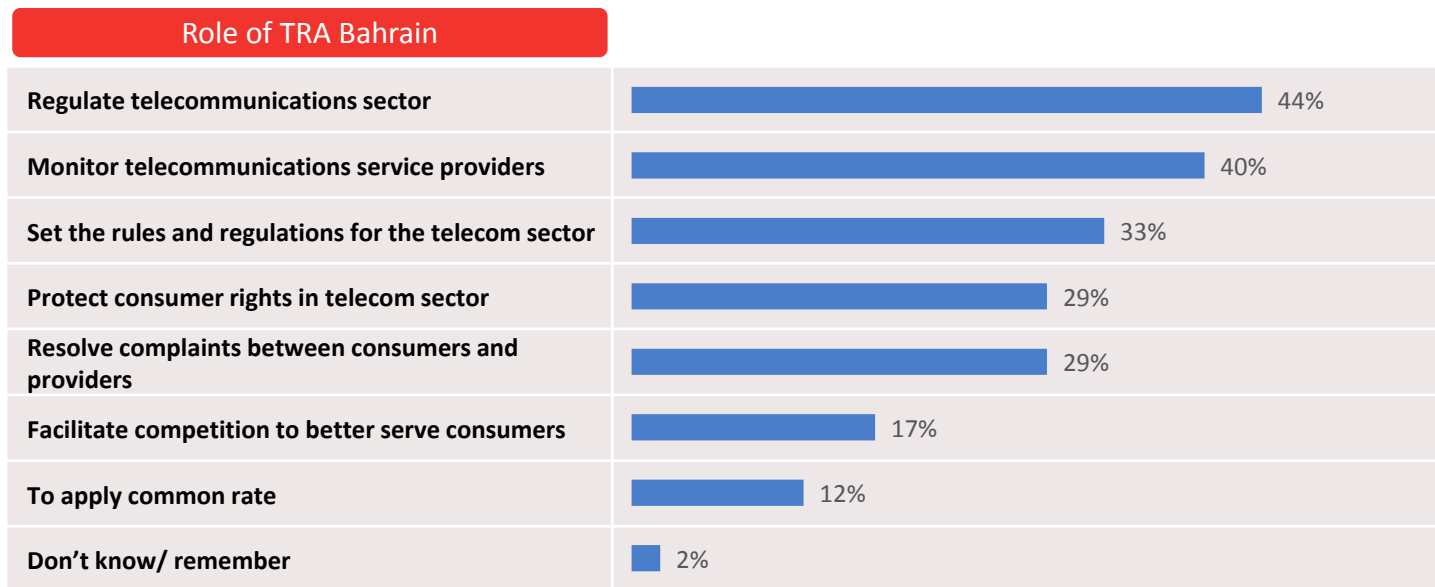
Sources of Awareness



Base: who are aware of TRA, 205

ROLE OF TRA BAHRAIN

TRA Bahrain Is Well Known For Regulating And Monitoring The Telecommunication Sector.

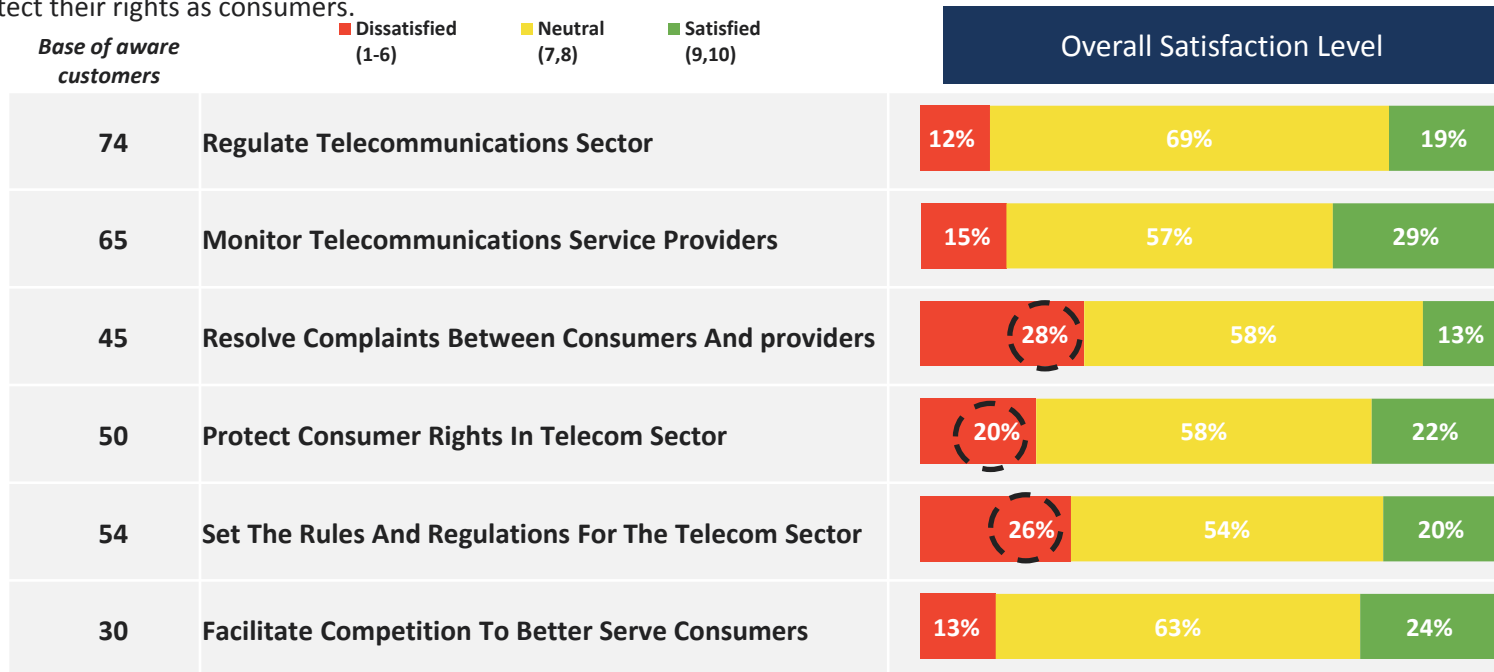


Base: who are aware of TRA Bahrain, 205

SATISFACTION OF TRA BAHRAIN ROLE

Businesses expressed average satisfaction from the current role of TRA Bahrain

- Some businesses see that TRA Bahrain can do more to solve problems between providers and businesses, to set the governing rules, and, to protect their rights as consumers.

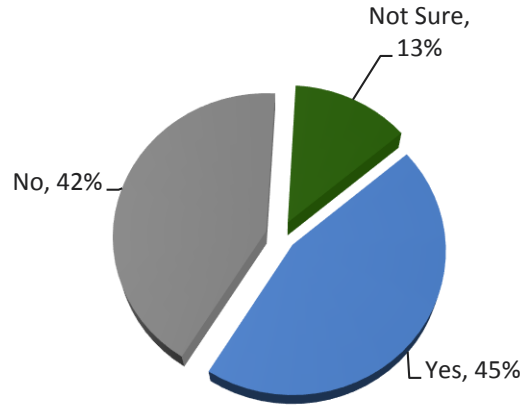


AWARENESS OF CONSUMER RIGHTS

Only 45% Of Businesses Claimed To Know Their Rights As Consumers

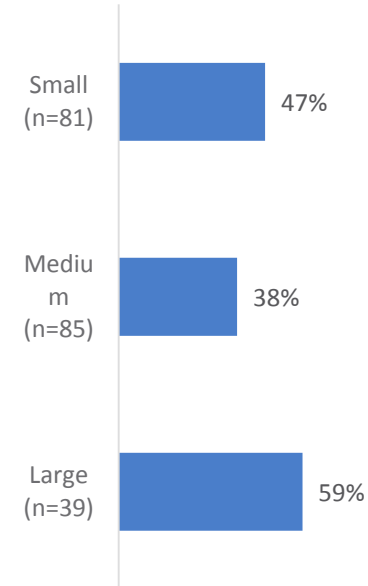
➤ Large Businesses are the most aware of their consumer rights.

Awareness of Consumer Rights



Base: who are aware of TRA; 205

By Company Size

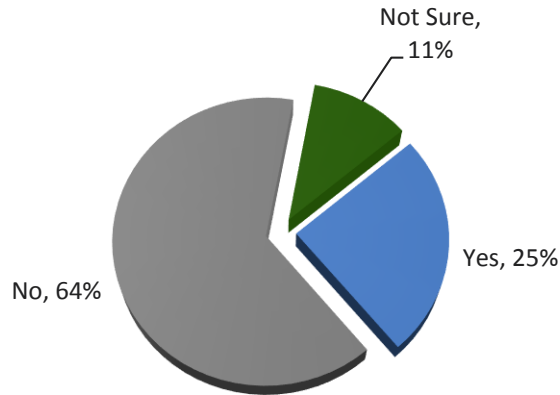


RECOGNITION OF TRA AWARENESS CAMPAIGNS

TRA Bahrain Awareness Campaigns Reached 25% Of Businesses.

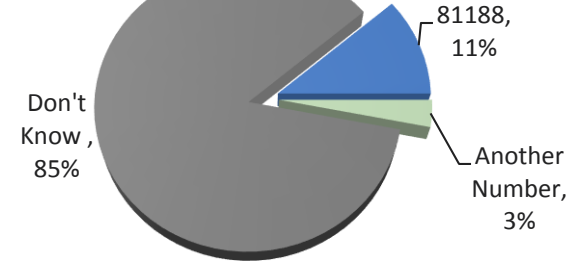
➤ Moreover, Few businesses are aware of the Call Center Number

Seeing TRA Awareness Campaigns



Base: who are aware of TRA; 205

Awareness of TRA Call Center Number

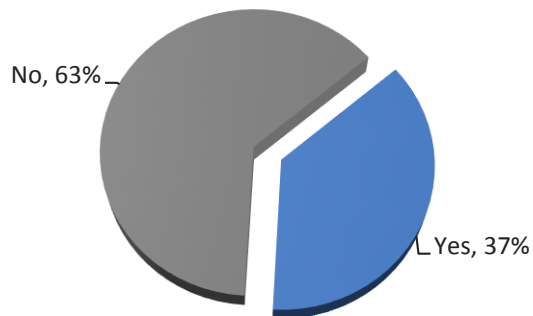


AWARENESS OF TRA WEBSITE

37% of Businesses Are Aware Of TRA Website

- Those who surfed the website before, wish to see more information and how the complaint process would be like.

Awareness of TRA Website

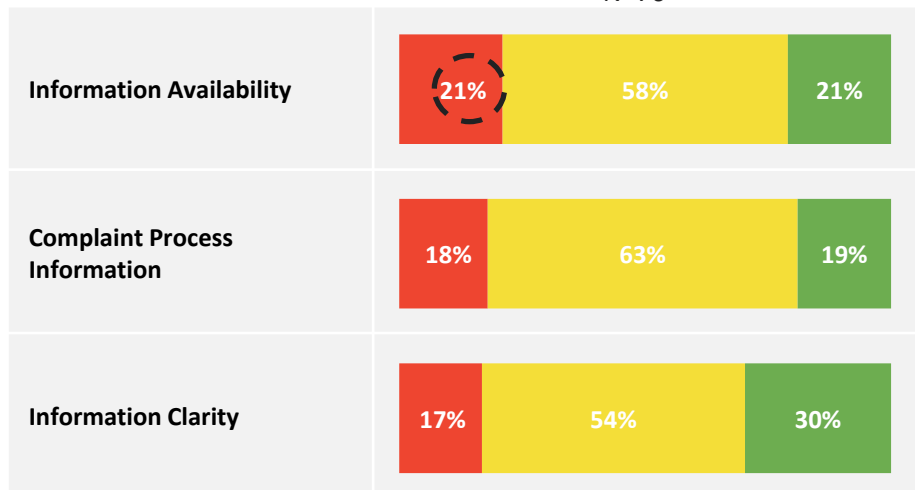


Base: who are aware of TRA; 205

■ Dissatisfied (1-6)
 ■ Neutral (7,8)
 ■ Satisfied (9,10)

Satisfaction of TRA Website

N=76



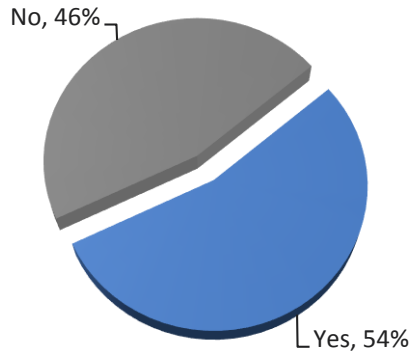


SUBMITTING COMPLAINTS TO TRA BAHRAIN

SUBMITTING COMPLAINTS AGAINST PROVIDERS

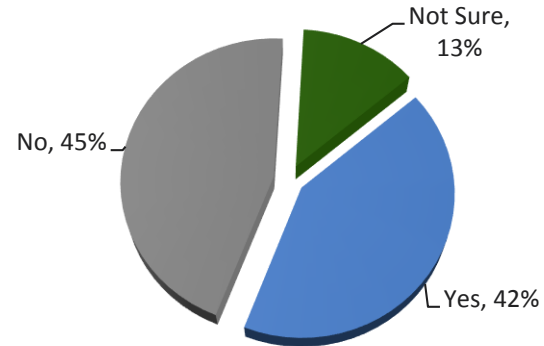
Around Half Of Businesses Are Aware Of The Ability & The Process Of Submitting Complaints Against Their Service Provider

Awareness Of The Ability To Submit Complaints With TRA against providers



Base: who are aware of TRA; 205

Awareness Of The Complaint Process



Base: who are aware of submitting complaints through TRA; 111

SUBMITTING COMPLAINTS AGAINST PROVIDERS

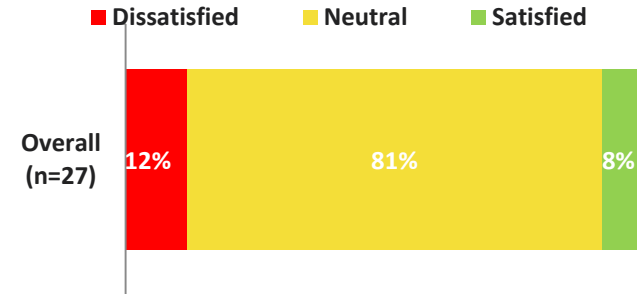
However, only 24% actually submitted complaints to TRA Bahrain.

- Unfortunately, they are not satisfied with the way of handling their complaints by TRA Bahrain

Submitting Complaints against providers



Satisfaction of Complaint handling from TRA Bahrain



Base: who are aware of submitting complaints through TRA; 111

End of Document