



Consumer Experience with the Main Telecommunications Providers- Residential Report

6 April 2016

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- TRA notes that the information contained in this report is based on a survey of a sample of 1520 residential consumers. All information contained in this report represent their opinions and perceptions at the time of data collection, and may not necessarily represent the market or the population as a whole.

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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 service 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. Consumer 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 need.
- Ipsos conducted the research survey with both residential & business consumers. The report at hand presents the key findings and insights of the residential consumer survey.
- The data collection was carried out during the November – December 2015.

Research Objectives

Main objective

This study aims at assessing the consumer awareness of TRA and satisfaction level of Telecommunication users when dealing with the main telecommunications services providers.

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



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



Recommend action plan per touch point based on improvements needed to increase consumers' satisfaction



Research Methodology

- The research was conducted using Computer Assisted Telephonic Interview methodology (CATI). Through this methodology, the questionnaire was scripted on Ipsos specialized system for the interview.
- All Interviews were done randomly. The CATI system selects Mobile numbers randomly, and provide contacts to interviewers.
- A team of well-experienced and trained interviewers, call these mobile numbers blindly. After introducing themselves and explaining the reasons for the call and masked interview, they seek respondents' permission to participate in the survey.
- After conducting the survey, a series of quality measures take place to ensure delivering highest quality, and error-free data. These measures are:
 - Parallel listing & Viewing for 30% of the total sample size split across all interviewers
 - Recording calls for a sample of the success interviews
 - Archiving system for 3 months
 - Random checking for around 5% of the recorded calls
 - 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 CATI interviews* with consumers using a structured questionnaire. Interviews were split as follows:

| Providers | Counts | % |
|--------------|-------------|-------------|
| Batelco | 519 | 34% |
| VIVA | 500 | 33% |
| Zain | 501 | 33% |
| Total | 1520 | 100% |
| | | |
| Subscription | Counts | % |
| Prepaid | 1201 | 80% |
| Postpaid | 319 | 20% |
| Total | 1520 | 100% |

- * All Interviews were done randomly. Our CATI system selects Mobile numbers randomly and provide contact to interviewers. Interviewers call the number blindly and conduct the survey with respondents. The system controls the quota. If an interview is being conducted with over-quota criteria, it is terminated automatically.

| Nationality | Counts | % |
|--------------|-------------|-------------|
| Bahraini | 680 | 45% |
| Arabs | 76 | 5% |
| Asians | 688 | 45% |
| Westerners | 76 | 5% |
| Total | 1520 | 100% |
| | | |
| governorate | | |
| Capital | 605 | 40% |
| Muharraq | 240 | 16% |
| Northern | 368 | 24% |
| Southern | 307 | 20% |
| Total | 1520 | 100% |

| Age | Counts | % |
|--------------|-------------|-------------|
| 15-19 | 145 | 10% |
| 20 - 24 | 194 | 13% |
| 25 - 29 | 225 | 15% |
| 30 - 34 | 230 | 15% |
| 35 - 39 | 222 | 15% |
| 40 – 44 | 190 | 13% |
| 45 – 49 | 121 | 8% |
| 50 – 54 | 79 | 5% |
| 55 – 59 | 114 | 8% |
| Total | 1520 | 100% |

Customer 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



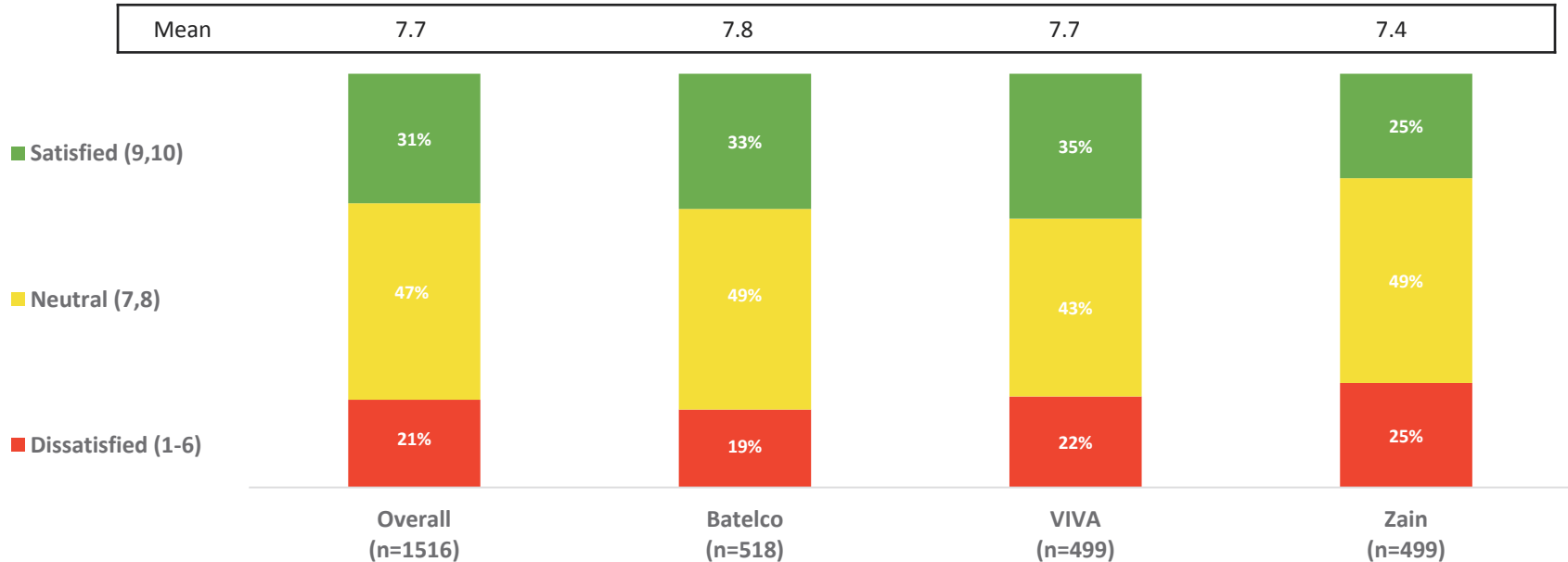
Summary Of consumers' Experience With Mobile Providers

- Overall, only **31% consumers are satisfied** from their experience with Mobile Providers. This is coming across all Providers. However, Zain consumers were slightly less satisfied than other Providers' consumers. Across Governorates, Residences of Capital, Muharraq & Southern Governorates seem to be satisfied from their experience with Mobile services more than residences of Northern governorate.
- This satisfaction trend is driven by different experience touch points, mainly **Network, Shops, Call Center, Communication, & Contract experience**. consumers expressed similar satisfaction levels across these aspects, with slight differences between Providers.
- However, consumer experience bottlenecks came mainly across **Offers**. Consumers suffered from the **very few offers** provided to them from Providers.
- **Tariffs** is considered another key dissatisfaction area across Mobile Users. Almost a third of mobile users suffered from the **clarity of tariffs, and unavailability of key tariff information**.
- Consumers as well suffered from their **data experience in general**, and more specifically with the **ceiling limit** imposed on their usage.
- Consumers are not happy with the waiting time over the call centers and in the shops of mobile Providers.
- Another minor **challenge** faced by Mobile consumers is Call Center agents' inability to **provide solutions to their problems from 1st call**. Further, the few consumers who had to formally submit complaints to Providers were extremely dissatisfied by their experience across all aspects.

OVERALL SATISFACTION OF MOBILE MARKET

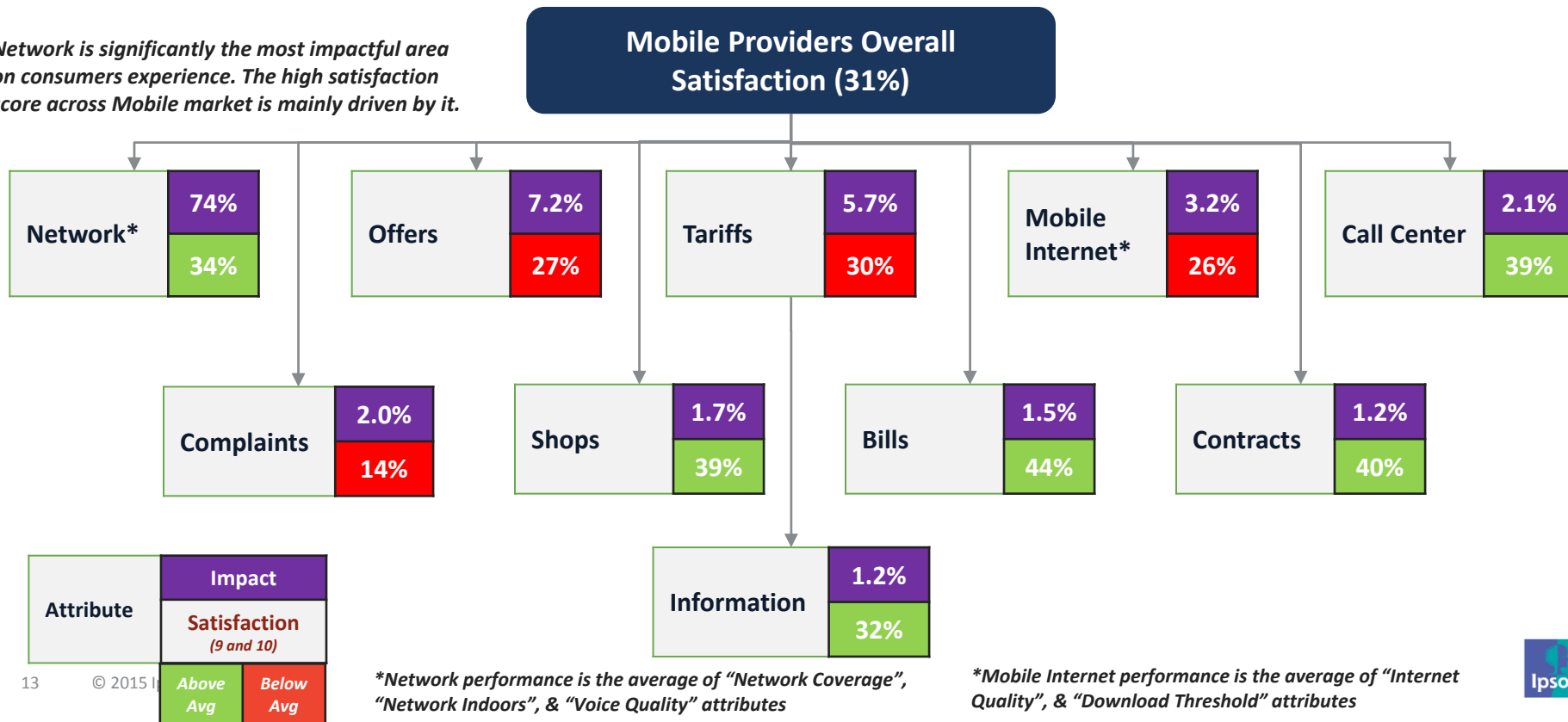
Consumers Are Somehow Satisfied with their Mobile Providers.

- Almost half of Providers' consumers expressed average satisfaction level. This was seen across all Providers, specifically Zain.
- On the other hand, one fifth of them were dissatisfied with their experience with mobile Providers.



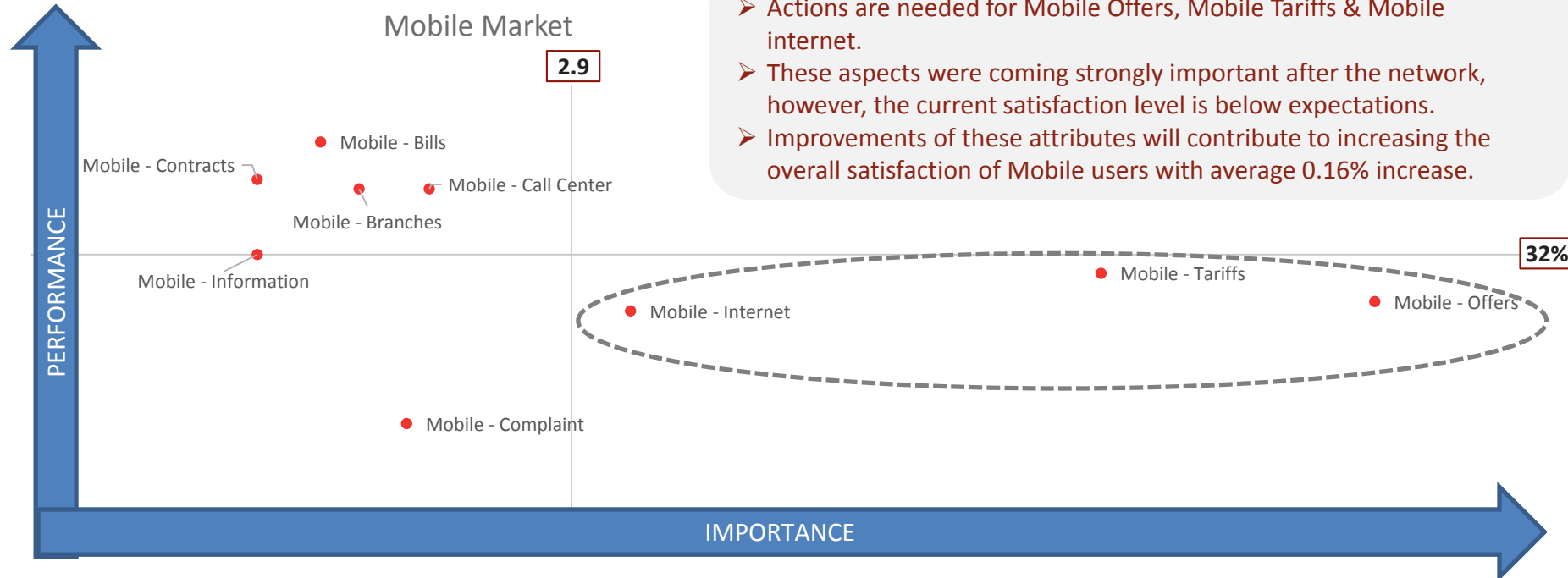
Offers, Tariffs, Internet Are Decreasing consumers' Satisfaction Score

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



RECOMMENDATIONS – IMPORTANCE VS. PERFORMANCE MATRIX

In The Mobile Market, Actions Should Focus On Offers, Tariffs & Internet

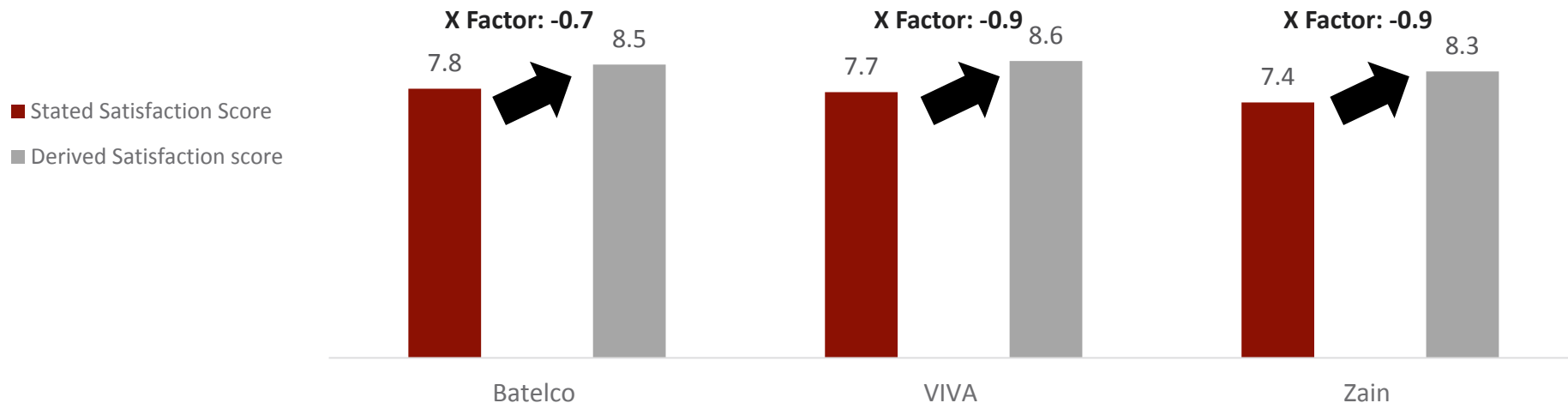


**Mobile Network came by far as the most important aspect which diluted results.
 Network was excluded from the matrix to have proper action plan*

SATISFACTION DRIVERS OF MOBILE SERVICES – SATISFACTION X FACTOR

Consumers' Perception Of Providers Is Decreasing Their Satisfaction

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



Providers need to enhance communication and interactions with consumers in order to increase stated satisfaction level

What Are Improvements Needed Across Below Average Attributes?

Based on the action matrix and the current performance level of Offers, Tariffs, & Mobile 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**

➤ Offers

- Providers should provide mobile users with **“Variety of Offers”** which meet their needs. Any 1% improvement in this attribute will increase market overall satisfaction score by 0.072%.

➤ 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 consumers. Any 1% improvement in this aspect will increase market overall satisfaction score by 0.056%.

➤ Internet

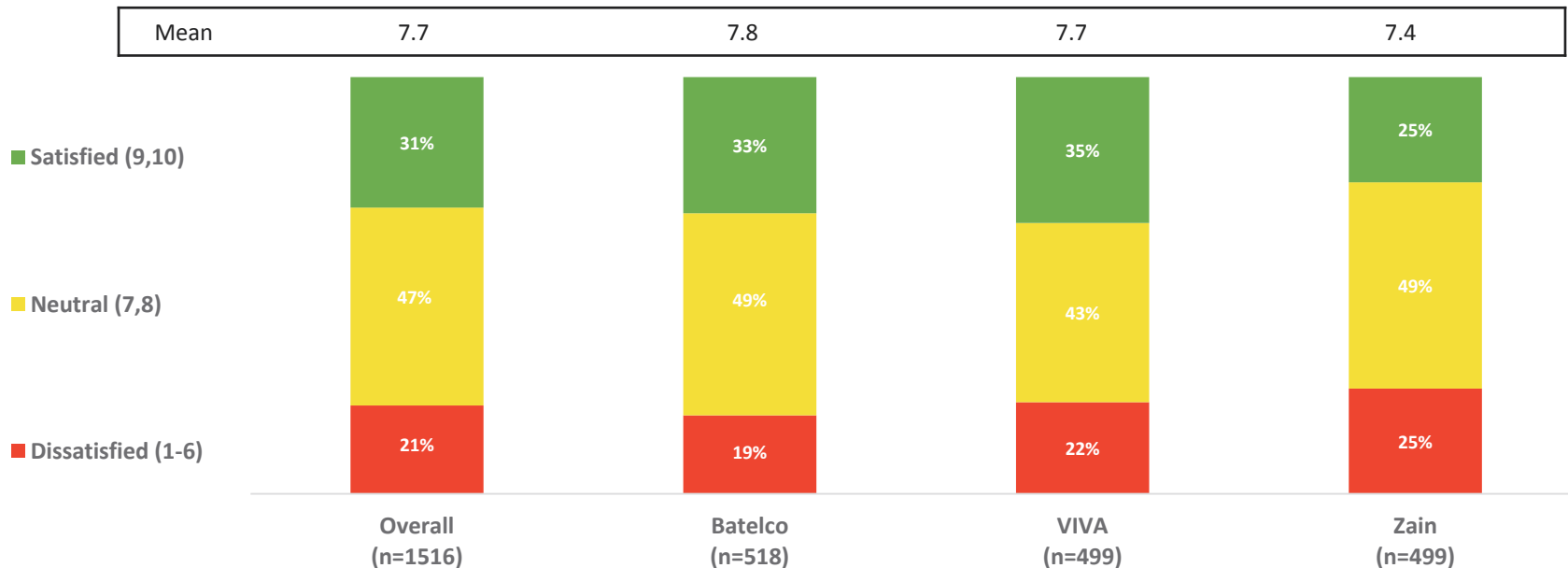
- The **Data Quality Experience** seems to be challenging. Providers should focus on providing consumers with the best data experience and maintain a high service stability level. Any 1% improvement in this attribute will increase market overall satisfaction score by 0.032%.

DETAILED FINDINGS OF MOBILE

OVERALL SATISFACTION OF MOBILE MARKET

Consumers Are Somehow Satisfied with their Mobile Providers.

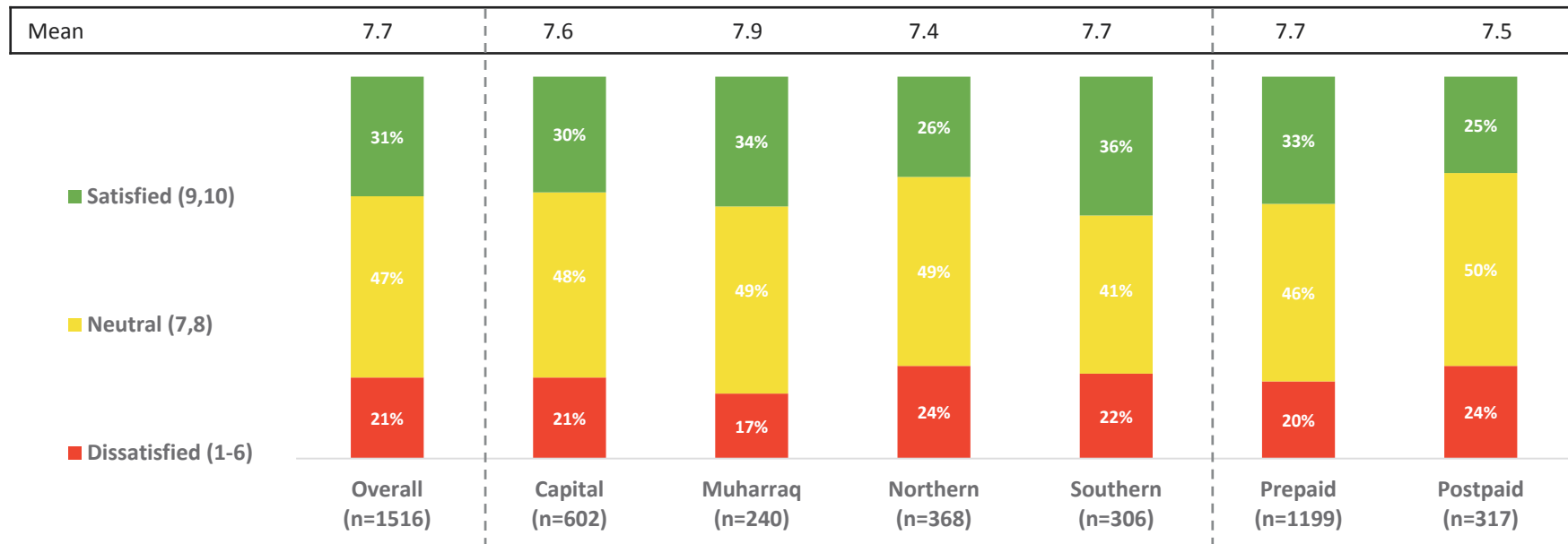
- Almost half of Providers' consumers expressed average satisfaction level. This was seen across all Providers, specifically Zain.
- On the other hand, one fifth of them were dissatisfied with their experience with mobile Providers.



MOBILE OVERALL SATISFACTION BY LOCATION & SUBSCRIPTION

The Average Satisfaction Is Seen Across All Governorates.

- Residents of Northern governorate were less satisfied with their mobile experience than other Governorates. The same was seen across Postpaid consumers.



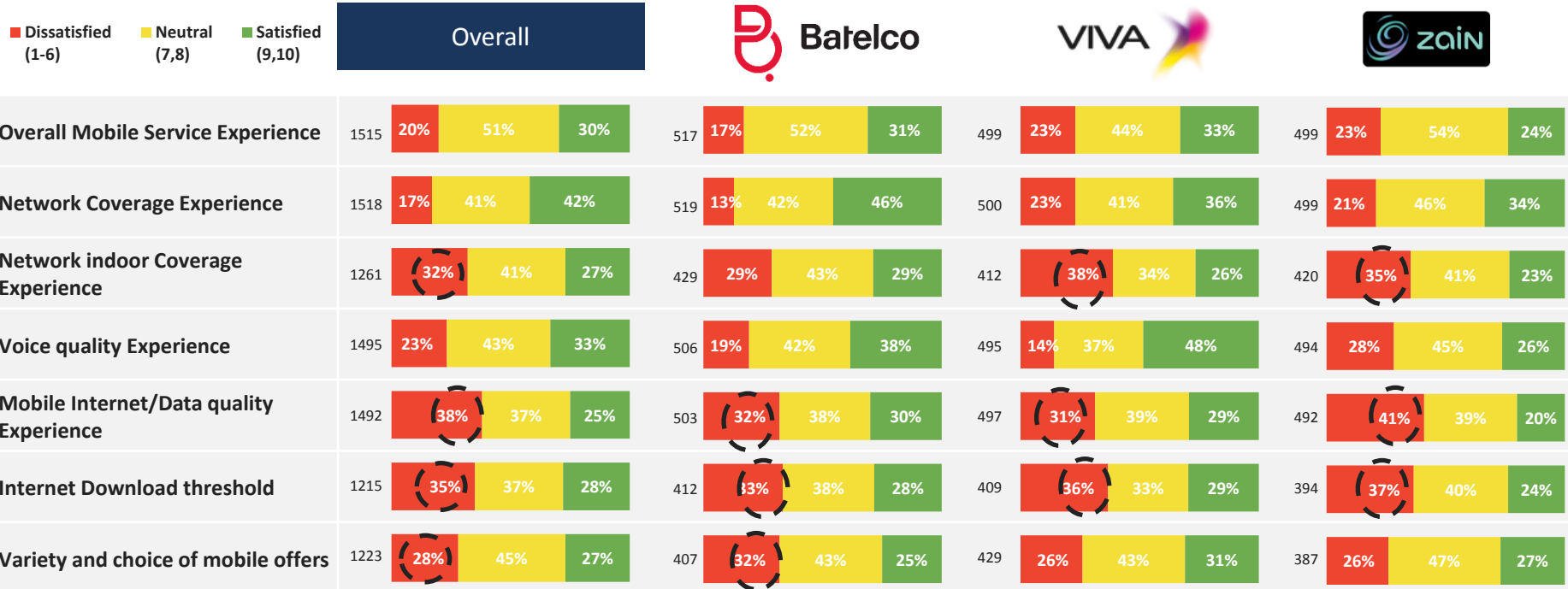


CONSUMER EXPERIENCE WITH MOBILE PROVIDERS' SERVICE AND NETWORK

SATISFACTION OF MOBILE ASPECTS

Indoors Coverage, Internet & Offers Drove consumers' Dissatisfaction

- Network indoors coverage, Data quality & Download Threshold are key dissatisfaction drivers across all Providers, specially across Zain & VIVA consumers.



CONSUMER EXPERIENCE WITH MOBILE PROVIDERS' SHOPS



VISITING PROVIDERS' SHOPS IN PAST 6 MONTHS

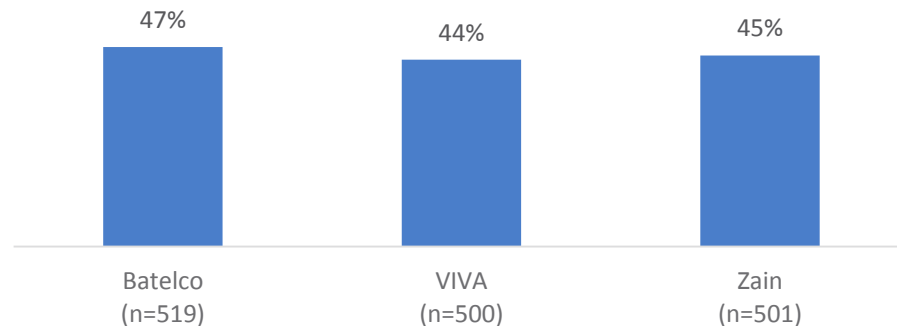
Almost Half Of Consumers Visited Providers' Shops In Past 6 Months

Overall



Base: All Respondents; 1520

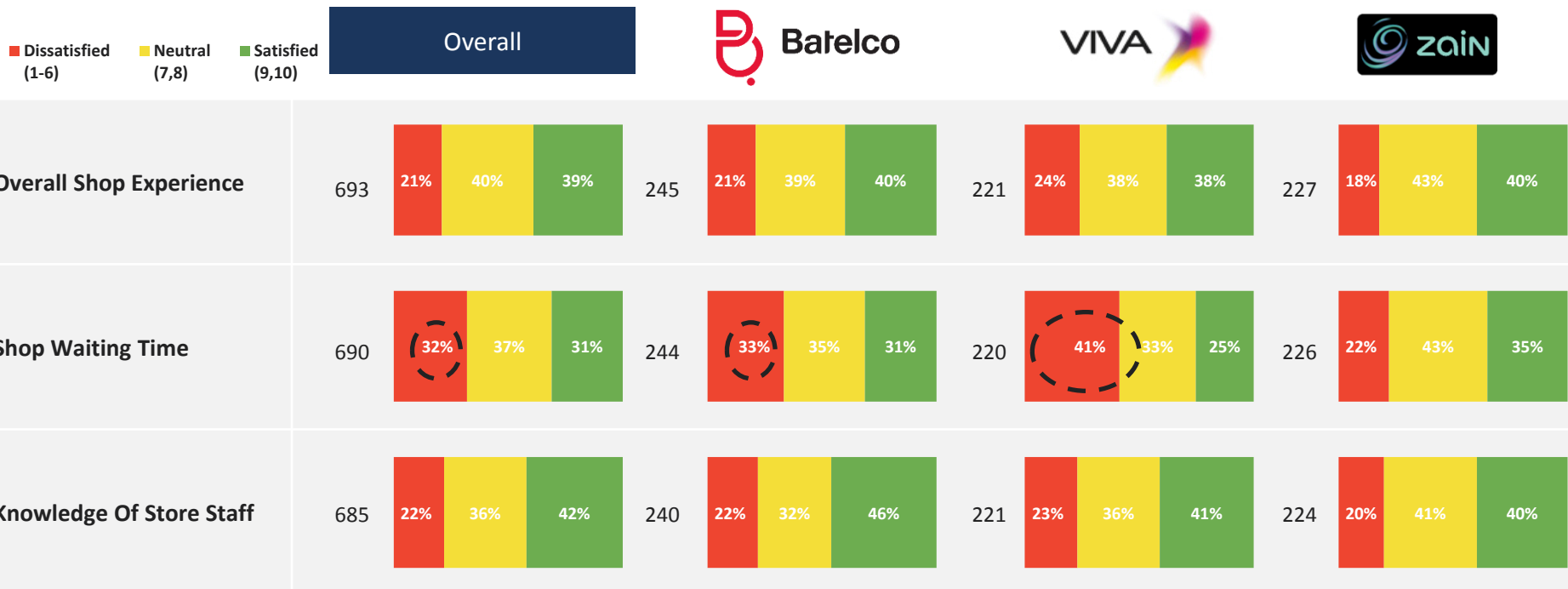
By Provider



SATISFACTION OF PROVIDERS' SHOPS

Consumers Are Somehow Dissatisfied Because Of The Waiting Time.

- Waiting time was a dissatisfactory driver across VIVA consumers, significantly more than other Providers' consumers.





CONSUMER EXPERIENCE WITH MOBILE ProviderS' CALL CENTER

EXPERIENCING MOBILE PROVIDERS' CALL CENTER IN PAST 6 MONTHS

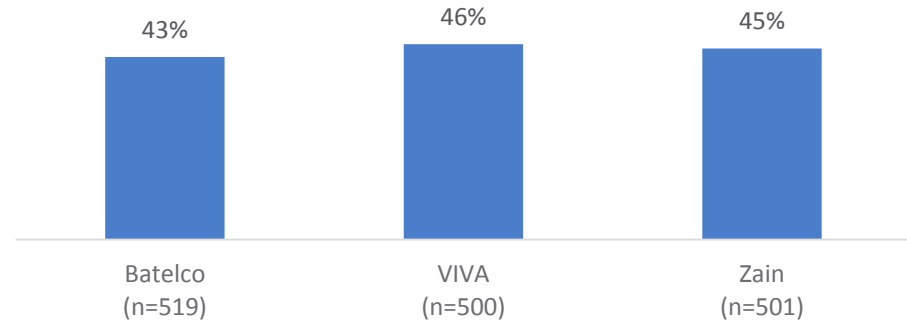
Almost 45% Of Providers' consumers Experienced Call Center In Past 6 Months

Overall



Base: All Respondents; 1520

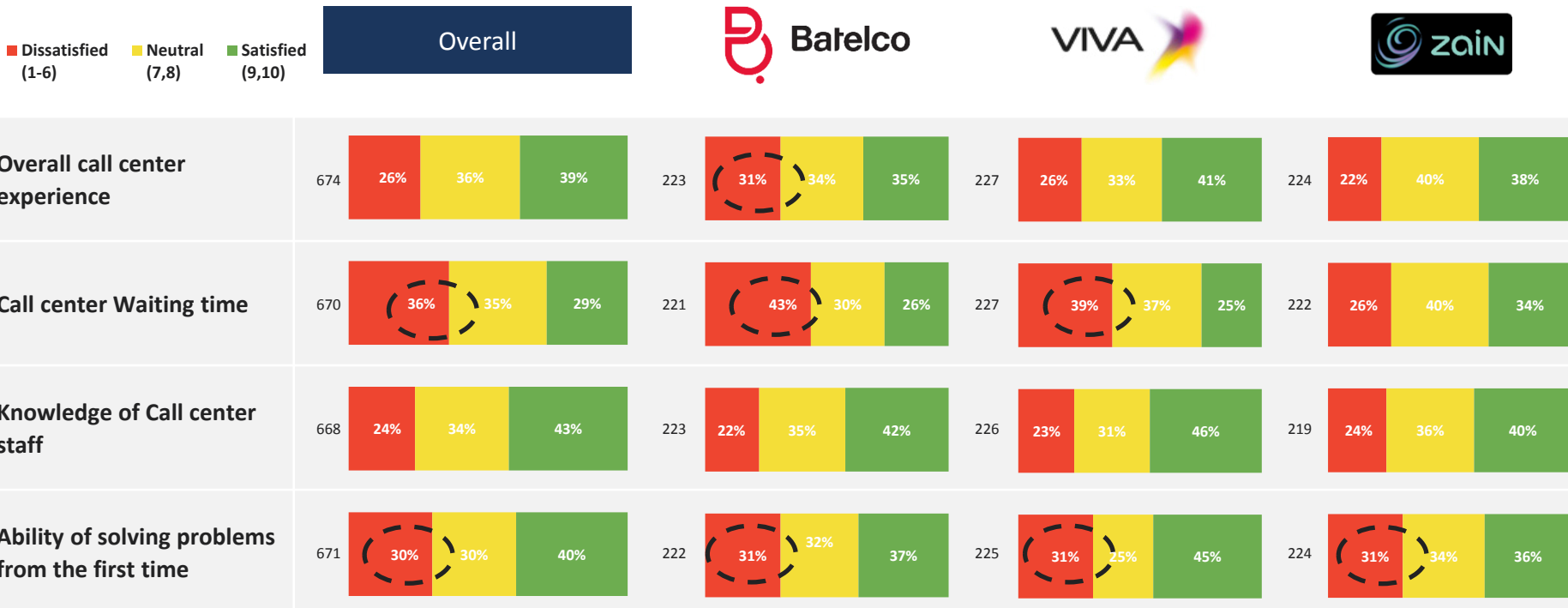
By Provider



SATISFACTION WITH MOBILE PROVIDERS' CALL CENTER

Similarly To Shops, consumers Are Somehow Dissatisfied

- “Waiting Time” & “Agents’ inability to solve problems from first time” drove consumers’ dissatisfaction from their experience with mobile Providers’ call center.



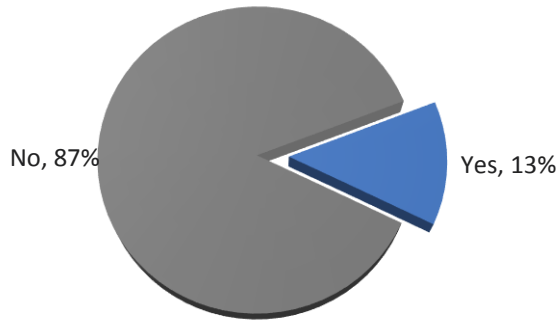


CONSUMER EXPERIENCE WITH MOBILE ProviderS' COMPLAINT HANDLING

SUBMITTING COMPLAINTS TO PROVIDERS

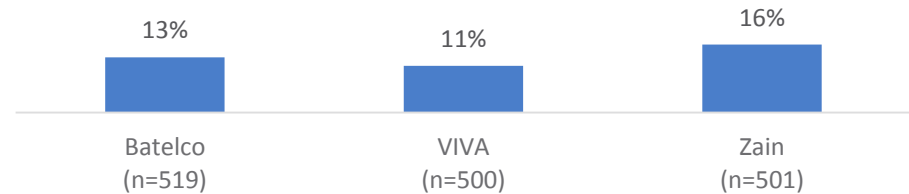
Minority Of consumers Submitted Complaints To Providers.

Overall



Base: All Respondents; 1520

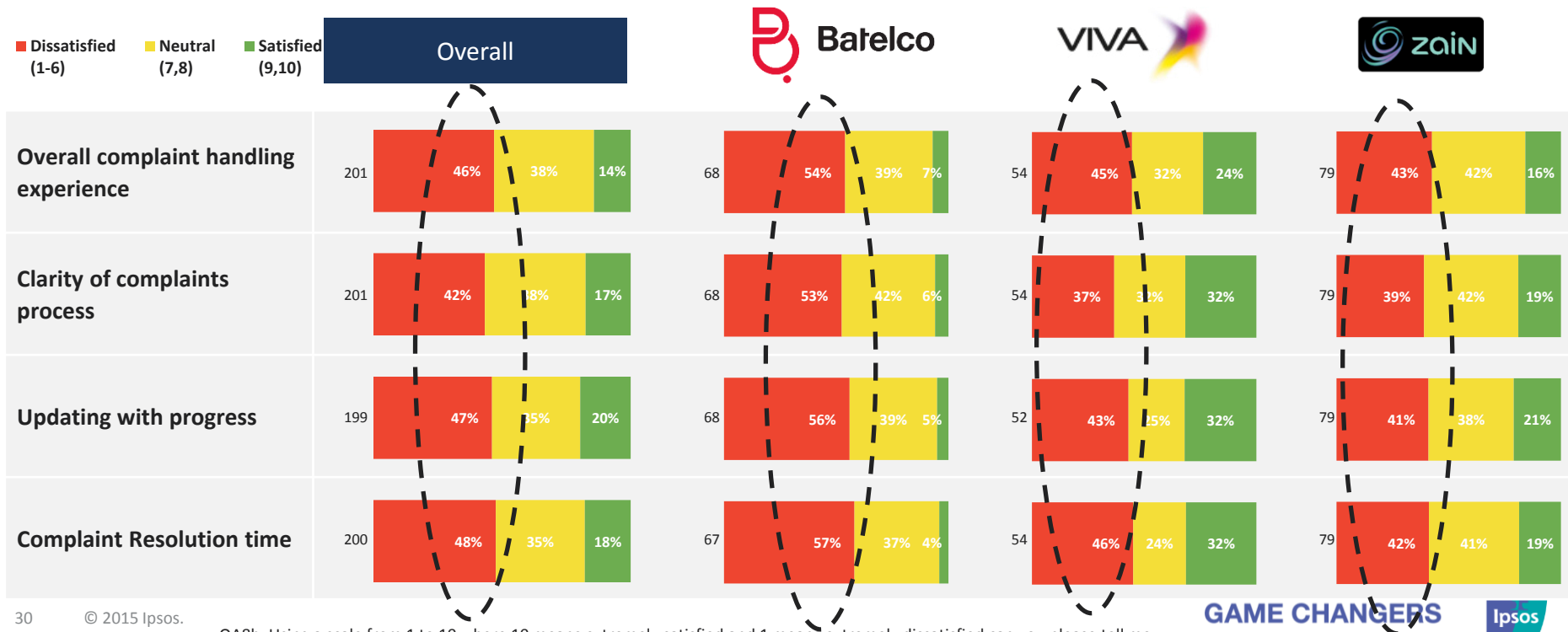
By Provider



SATISFACTION OF COMPLAINT HANDLING

Yet They Are Dissatisfied From The Way Of Handling Their Complaints

- Batelco consumers are significantly dissatisfied from their experience of submitting complaints than other consumers. This was coming across all attributes.



QA8b. Using a scale from 1 to 10 where 10 means extremely satisfied and 1 means extremely dissatisfied can you please tell me to what extent are you satisfied or dissatisfied with your mobile service provider for

CONSUMER EXPERIENCE WITH MOBILE ProviderS' INFORMATION



SATISFACTION OF MOBILE PROVIDERS' INFORMATION

Transparency Of Information Is Averagely Satisfying.

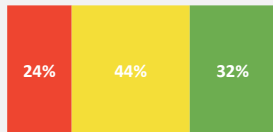
■ Dissatisfied (1-6) ■ Neutral (7,8) ■ Satisfied (9,10)

Overall

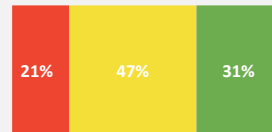


Overall transparency of information on mobile services

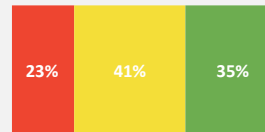
1339



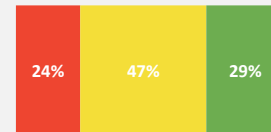
455



468

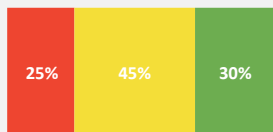


416

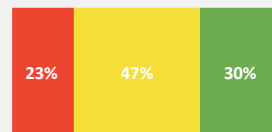


Transparency of Information on website

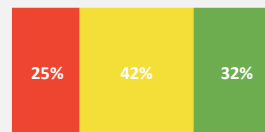
938



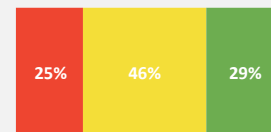
320



337

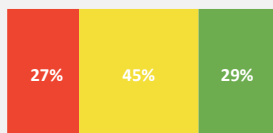


281

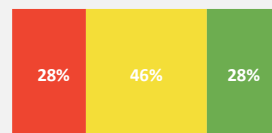


Transparency of Information in ads

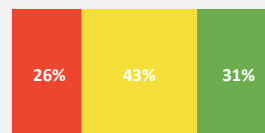
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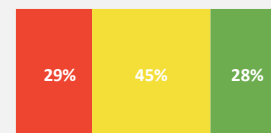
389



427



358

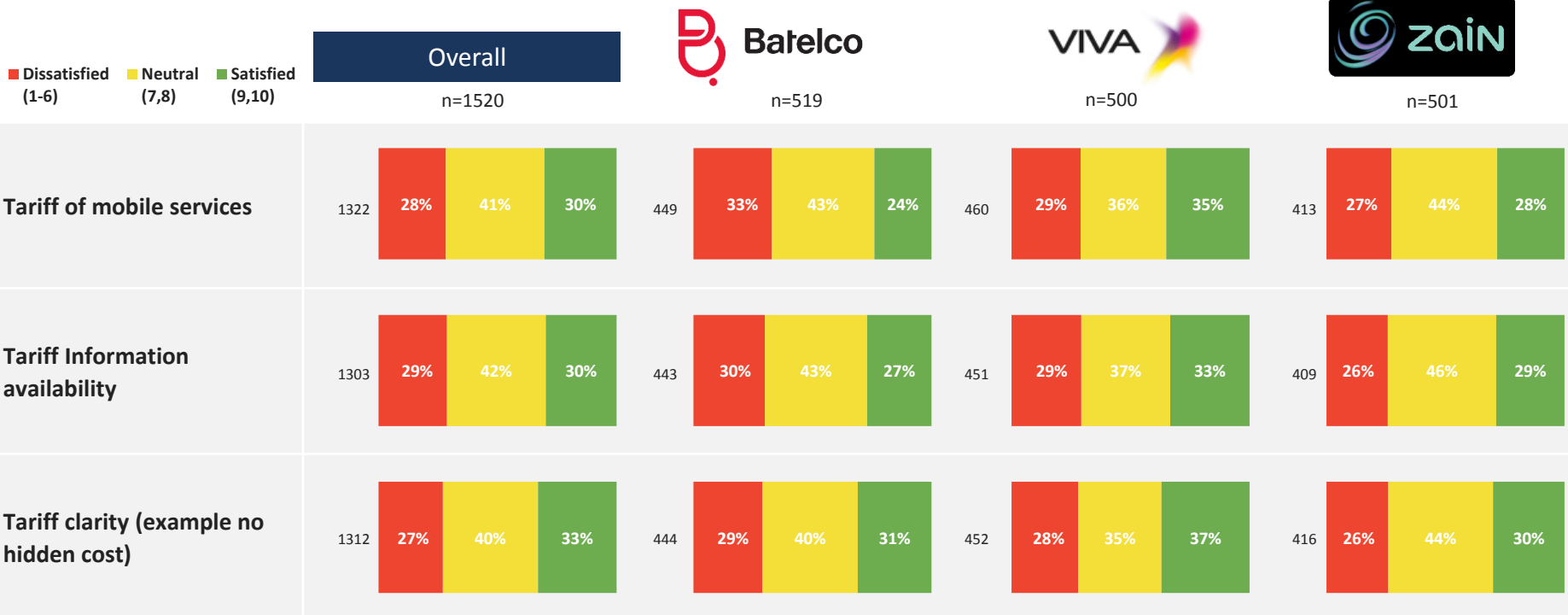




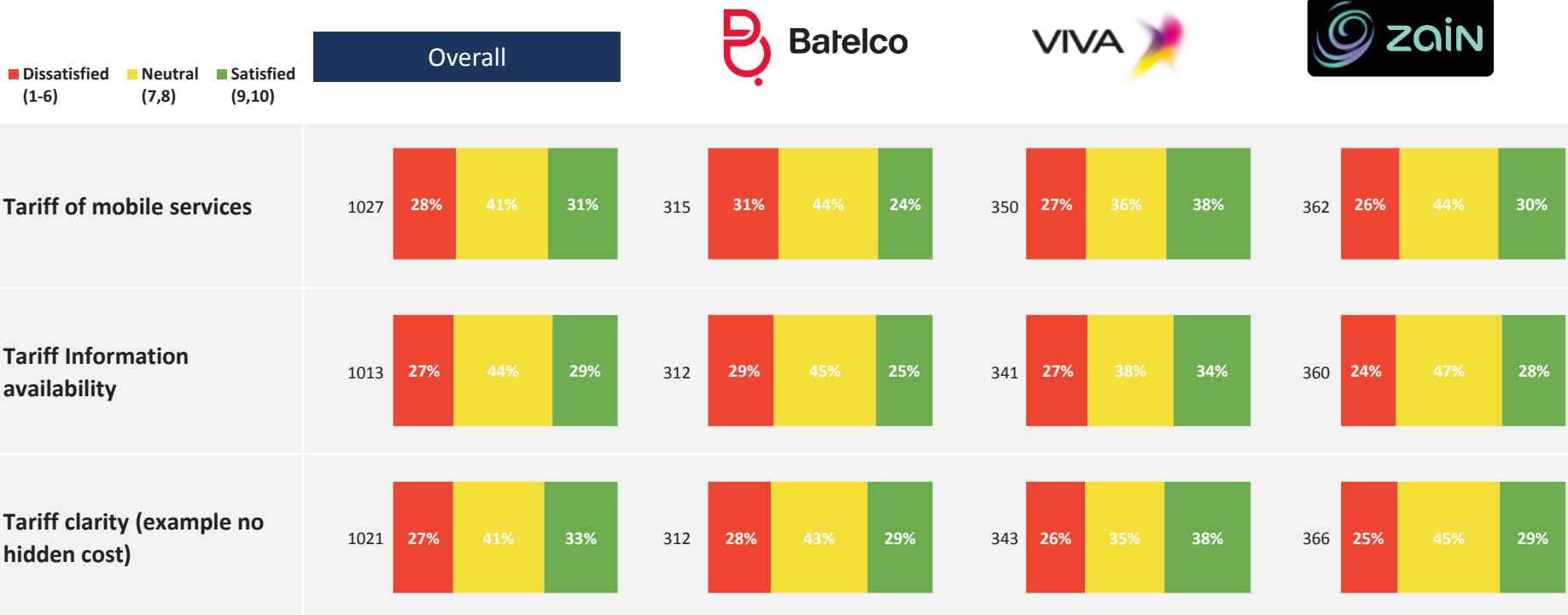
CONSUMER EXPERIENCE WITH MOBILE ProviderS' TARIFFS & BILLS

SATISFACTION OF MOBILE TARIFFS | OVERALL

Consumers Are Split For Their Satisfaction Of Providers' Tariffs

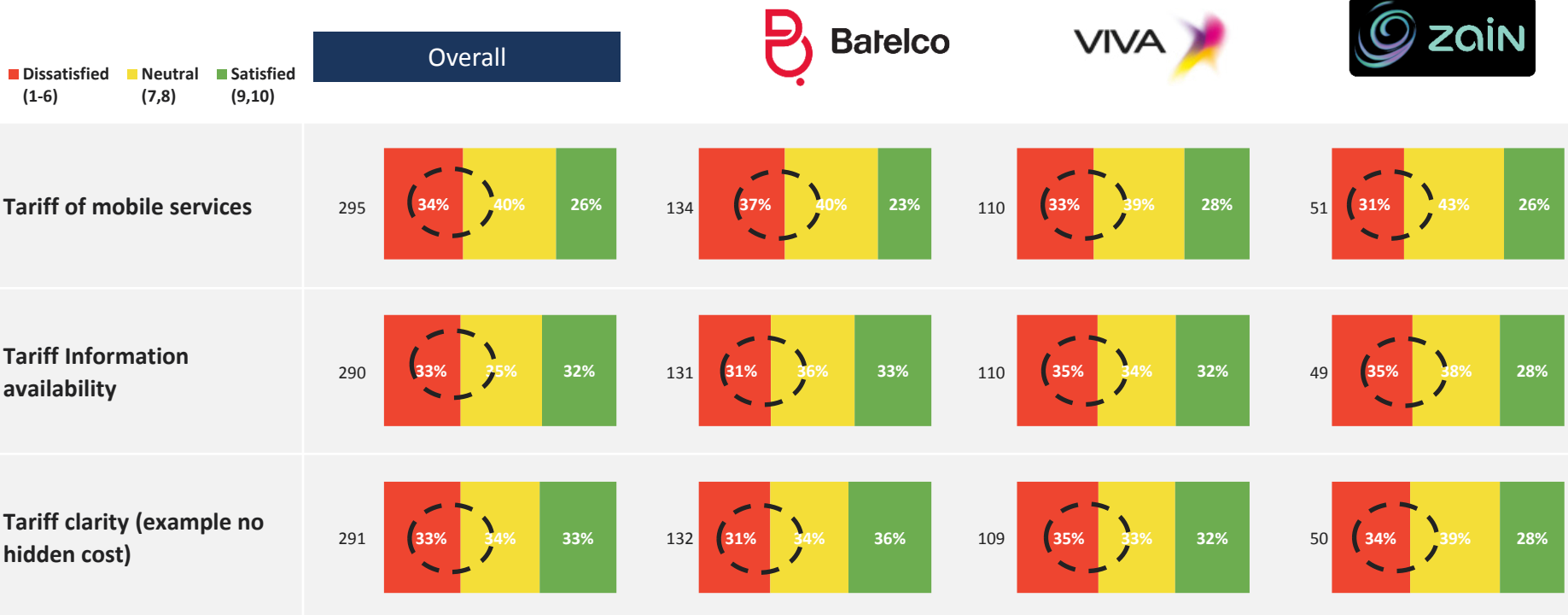


Similarly Across Prepaid consumers



SATISFACTION OF MOBILE TARIFFS | POSTPAID

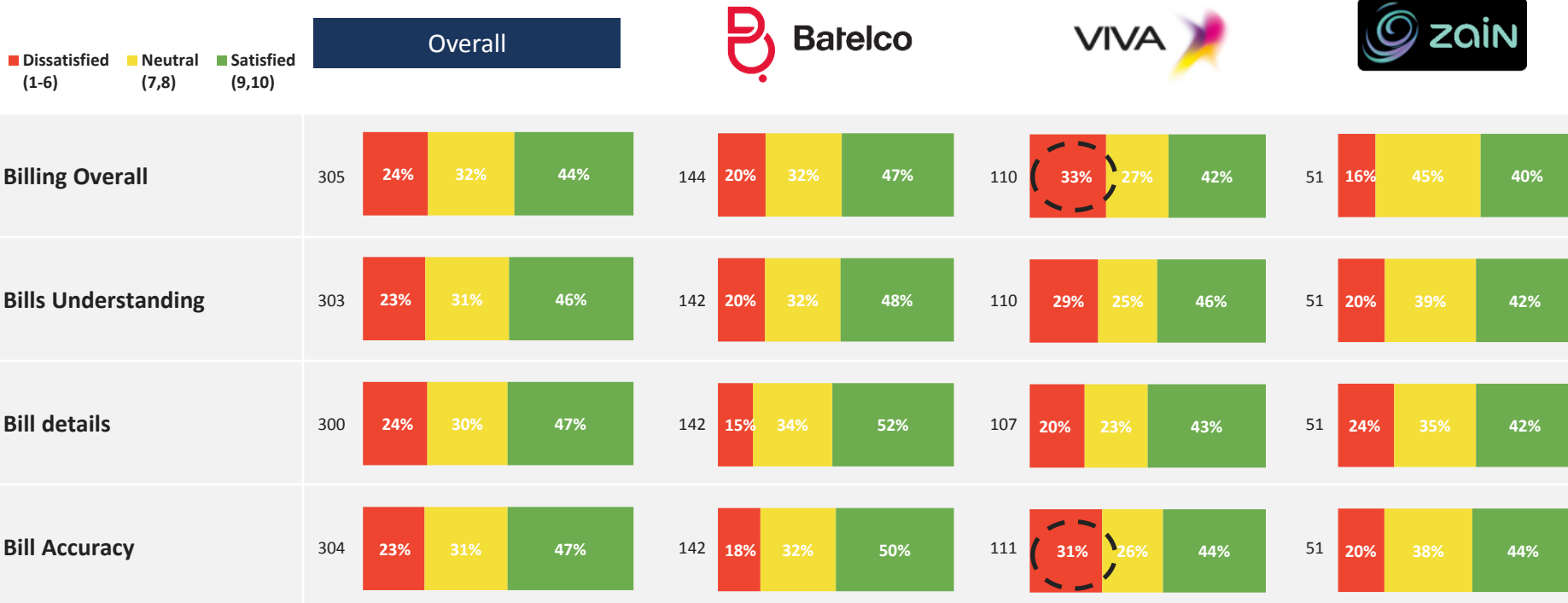
Contrary, Postpaid Consumers Were Less Satisfied From Their Tariffs



SATISFACTION OF BILLS | POSTPAID CONSUMERS

Yet Postpaid consumers Are Satisfied From Their Bills

➤ Some of VIVA postpaid consumers suffered from their bills more than other Providers consumers, specially for the bills “Accuracy”.

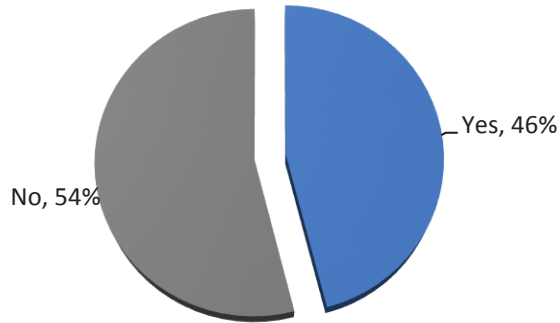




CONSUMER EXPERIENCE WITH MOBILE PROVIDERS' SERVICE AGREEMENT

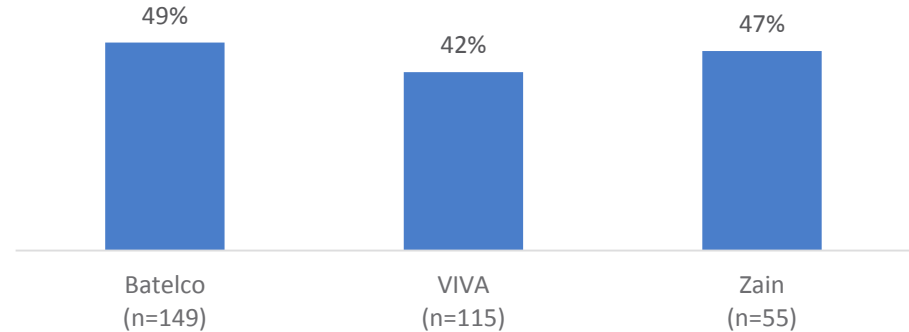
Almost Half Of Postpaid consumers Have Read Their Service Contract

Overall



Base: All Respondents; 319

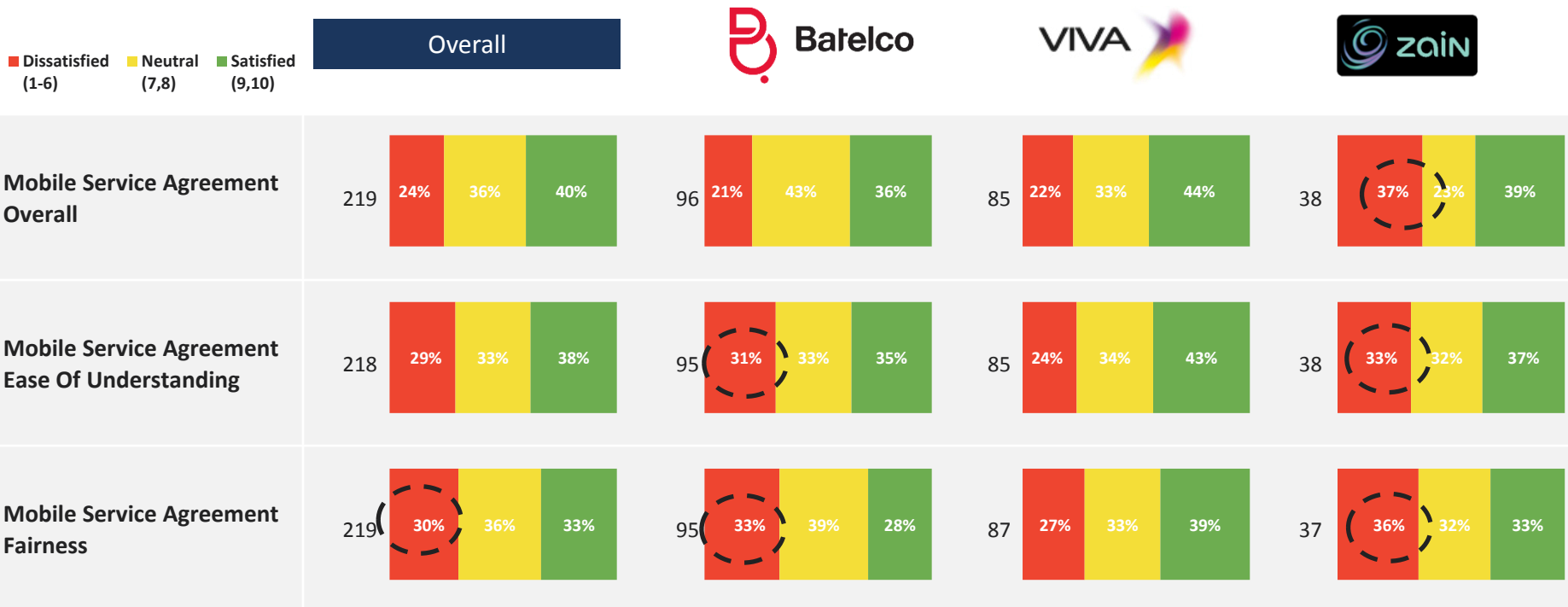
By Provider



SATISFACTION OF MOBILE SERVICE AGREEMENT | POSTPAID CONSUMERS

They are Generally Satisfied With Service Agreement.

➤ Though they suffered a little to understand it, and found it unfair. This was strongly seen across Zain postpaid consumers.



HOME BROADBAND

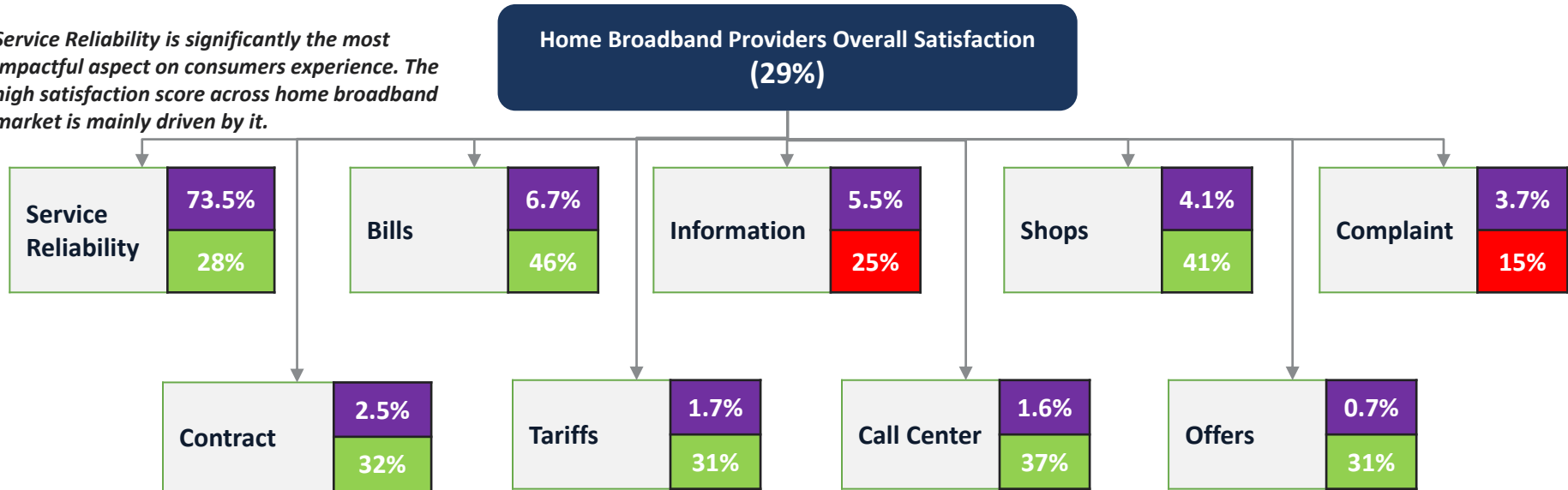
Summary Of consumers' Experience With Home Broadband Providers

- The majority are subscribing with wireless broadband connection, with 75% for wireless and 25% for fixed connection. Batelco seem to be dominating the fixed home broadband connection.
- Overall, **29% of consumers are satisfied** from their experience with Home Broadband services. Batelco & Mena Telecom subscribers expressed slightly higher satisfaction than VIVA & Zain subscribers. Furthermore, subscribers across Governorates have the same satisfaction score except subscribers in Southern governorate who expressed significantly higher satisfaction score than others.
- Subscribers' satisfaction from Home Broadband services was driven mainly by the **Service Reliability, Bills, Branch Experience, & Call Center**.
- On the other hand, **subscribers** faced some **challenges** which decreased their satisfaction. The biggest of which is their experience with **Transparency of Information provided by Providers, specially Across VIVA & Zain**. Following to this, consumers who had to formally submit complaints to Providers about their broadband services, were extremely dissatisfied from their experience. This contributed to decreasing their overall satisfaction score.
- Some challenges came across touch points, such as **Long Waiting time in Shops & Call Center**, in addition to **lack of staff knowledge**.

SATISFACTION DRIVERS OF HOME BROADBAND – ROOT CAUSE ANALYSIS

Several Challenges facing Home Broadband Experience

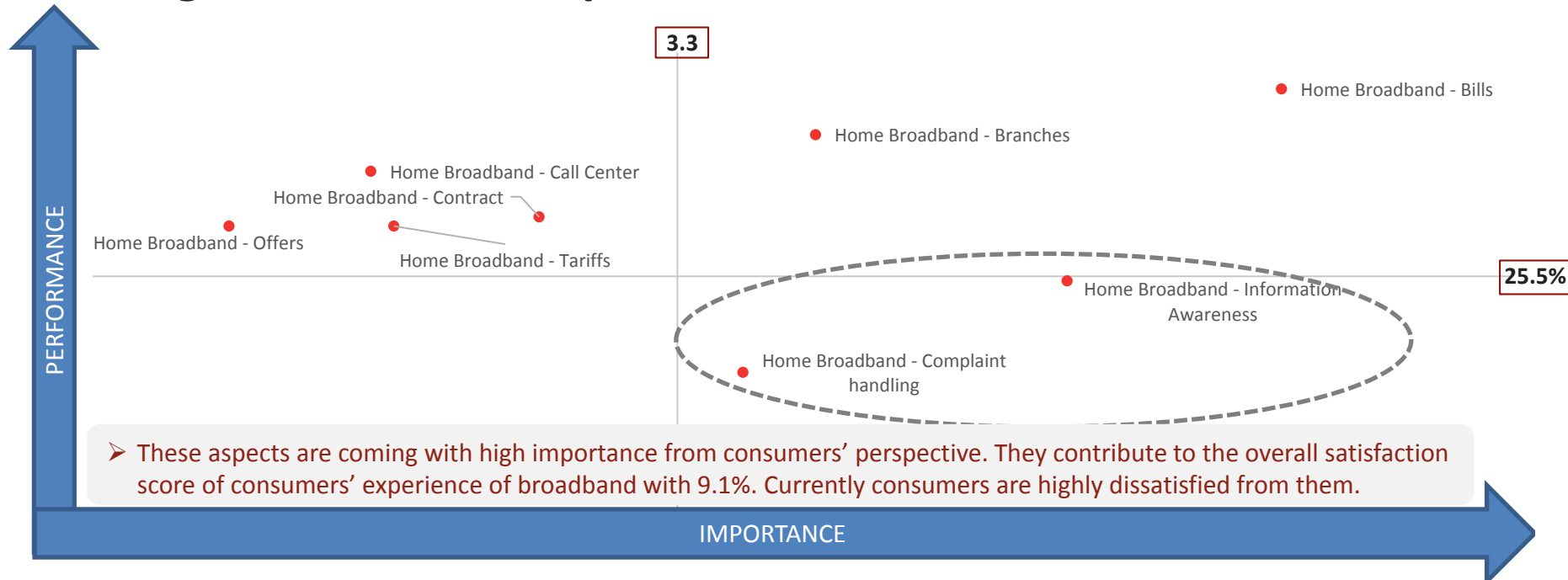
Service Reliability is significantly the most impactful aspect on consumers experience. The high satisfaction score across home broadband market is mainly driven by it.



| Attribute | Impact | |
|-----------|-------------------------|-----------|
| | Satisfaction (9 and 10) | |
| | Above Avg | Below Avg |

ACTION PLAN – IMPORTANCE VS. PERFORMANCE MATRIX

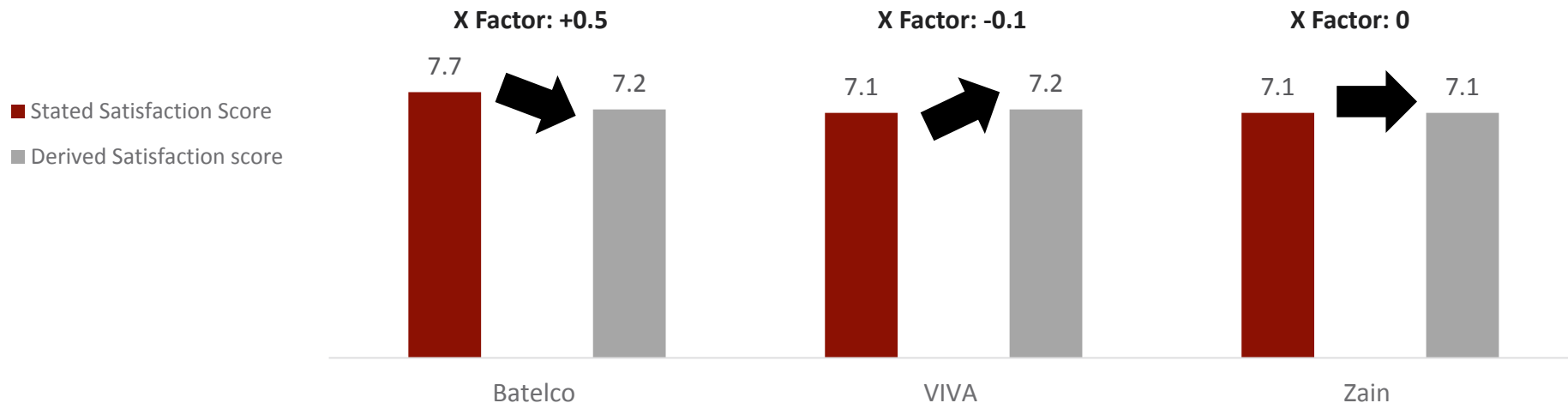
Actions Should Focus On Transparency Of Information & The Way Of Handling consumers' Complaints.



SATISFACTION DRIVERS OF HOME BROADBAND – SATISFACTION X FACTOR

Mixed Impact On consumers' Satisfaction Scores Across Providers

- The relationship between consumers' & Batelco is positively affecting the overall satisfaction score. It was seen the opposite for VIVA, with a very minor negative impact on the satisfaction score. Zain stands up to consumers' expectations as a brand. This **X Factor** is the impact of brand perception on the satisfaction score.



** Mena Telecom had insufficient base for this analysis (below 100 respondent)*

Batelco needs to enhance it's functional touch points while VIVA needs to enhance it's positioning to increase consumers' satisfaction score.

What Are Improvements Needed Across Below Average Attributes?

➤ Information Awareness

Consumers suffered from the Transparency of information provided by Providers either on their websites, or in the ads. This came across 30% of consumers who doubted the transparency of VIVA & Zain. Hence, Providers should provide all needed information to consumers in a clear way without any hidden conditions. Any 1% improvements in this aspect will contribute to consumers' overall satisfaction of home broadband experience with 0.055%.

➤ Complaint Handling

consumers who submitted complaints to Providers were highly dissatisfied from the way of handling their complaints, either the process itself or the resolution time

- Providers should **simplify the process of submitting complaints**. Any 1% improvements in this aspect will contribute to consumers' overall satisfaction of home broadband with 0.013%.
- Further, they need to **decrease the resolution time of consumers' problems**. Any 1 % improvements in this aspect will contribute to consumers' overall satisfaction of home broadband experience with 0.017%.

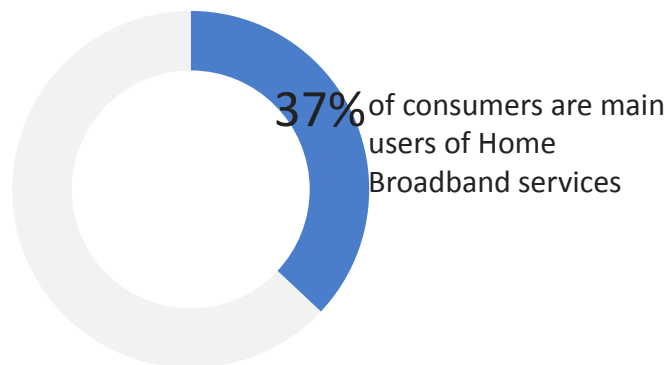
DETAILED FINDINGS OF HOME BROADBAND MARKET

USAGE OF HOME BROADBAND SERVICES

Only 37% Of Respondents are Main Users of Home Broadband

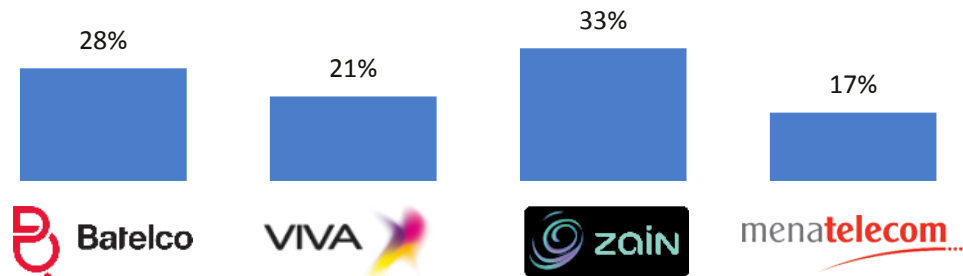
➤ Zain & Batelco account for almost two thirds of home broadband Main users

% Main Users of Home Broadband



Base: All Respondents; 1520

Service Providers

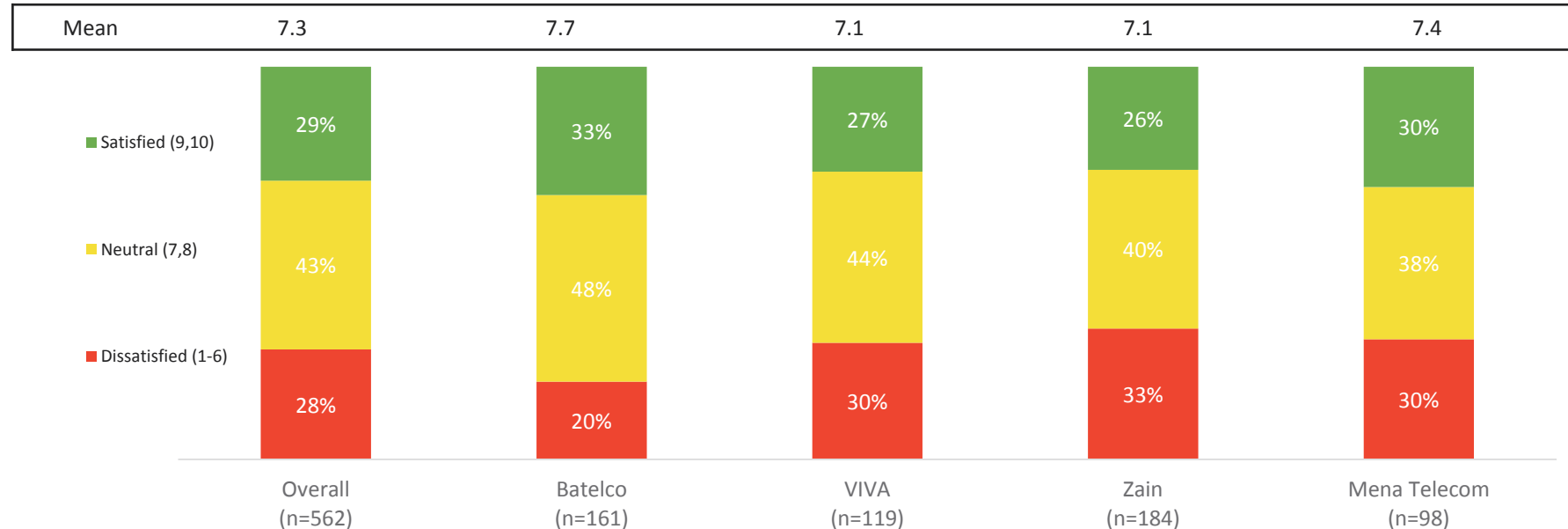


Base: who are main users of Home Broadband service; 562

OVERALL SATISFACTION OF HOME BROADBAND PROVIDERS

Consumers Has Average Satisfaction Toward Home Broadband Providers

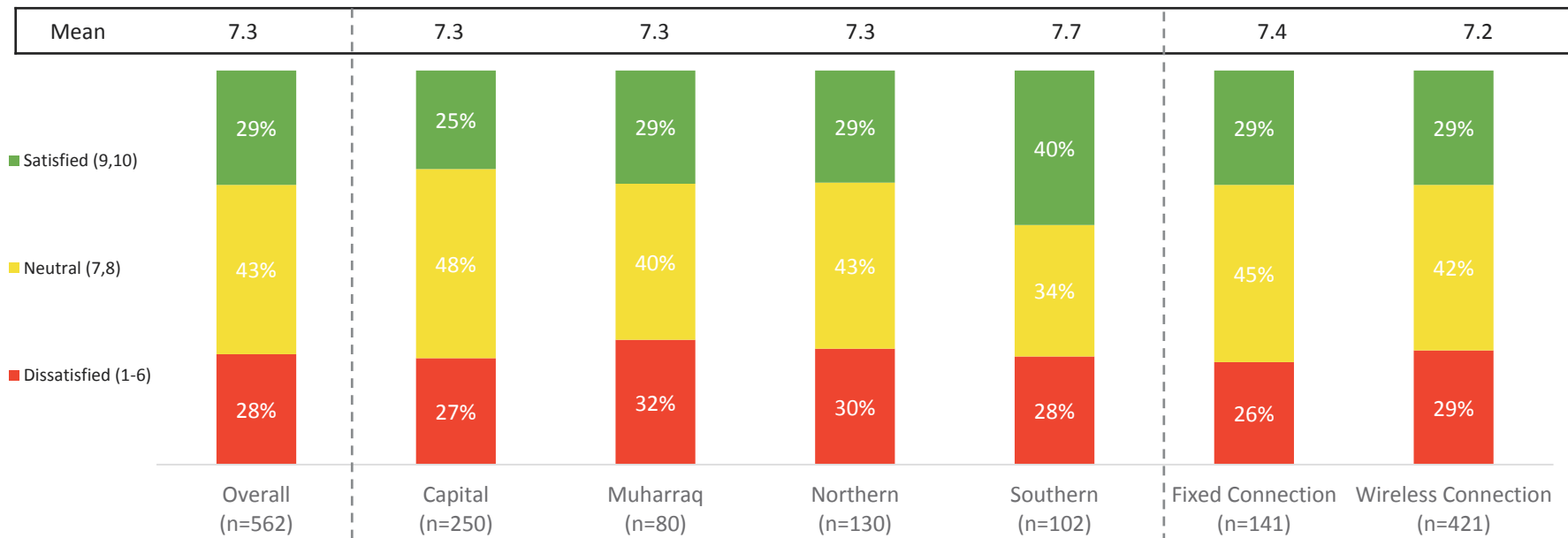
➤ Batelco seems to be satisfying its subscribers more than other Providers. Zain had the highest dissatisfied consumers across Providers



HOME BROADBAND OVERALL SATISFACTION BY LOCATION & TYPE

This Average satisfaction is coming across all governorates except Southern

- Southern governorate the highest satisfied users at 40%.
- Fixed Users have higher satisfaction level then those who use wireless connection.



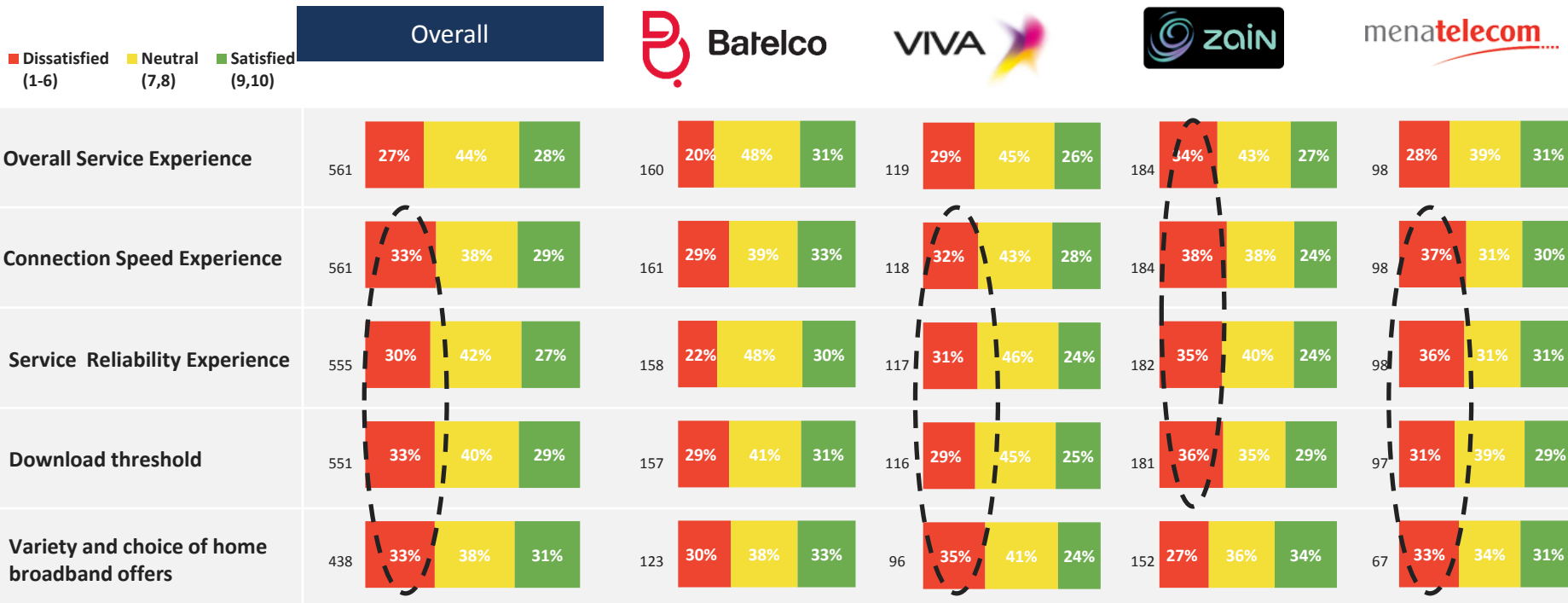


CONSUMER EXPERIENCE WITH HOME BROADBAND PROVIDERS' SERVICE AND NETWORK

SATISFACTION OF HOME BROADBAND ASPECTS

Several Attributes Drove consumers' Dissatisfaction Of Broadband Providers

- Third of Bahraini consumers are unsatisfied with most broadband aspects
- Batelco stands for better performance than other Providers, yet without significant differences.



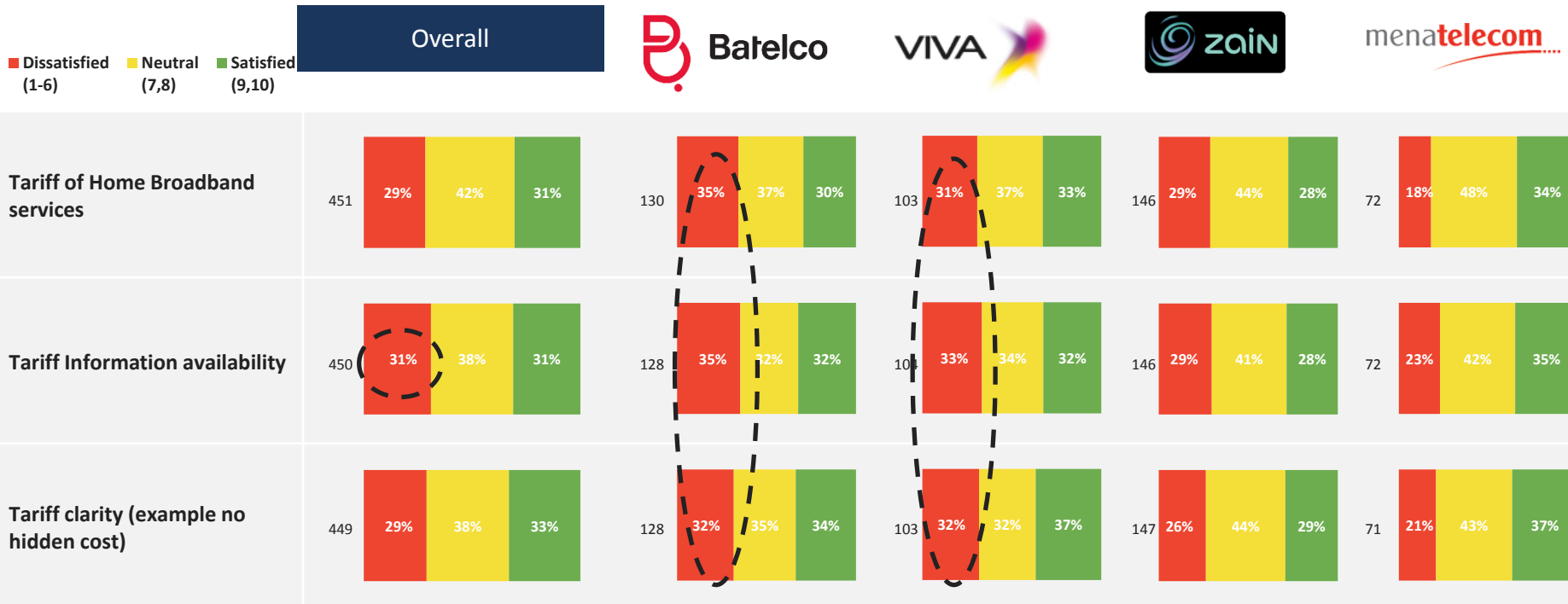


CONSUMER EXPERIENCE WITH HOME BROADBAND ProviderS' TARIFFS & BILLS

SATISFACTION OF HOME BROADBAND TARIFFS

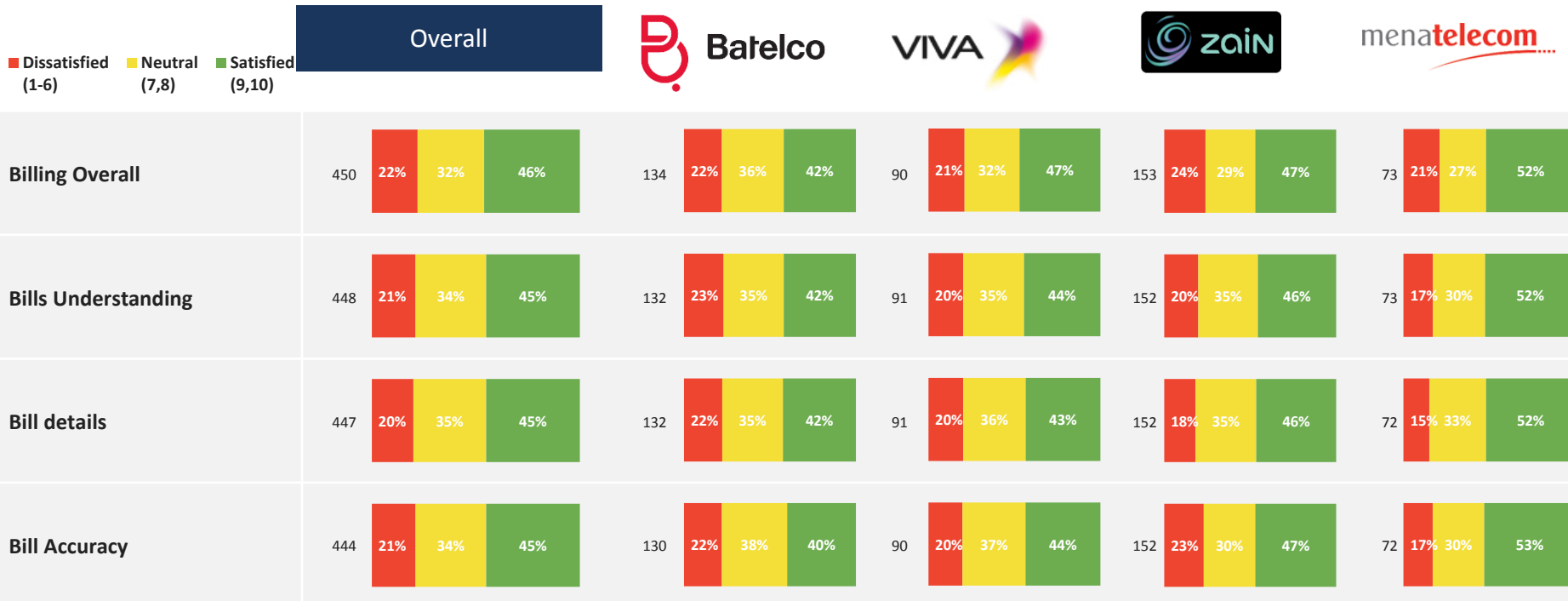
Average Satisfaction Of Home Broadband Tariffs Is Seen Across All

➤ Batelco & Viva subscribers are the most dissatisfied with their tariffs, on all aspects



SATISFACTION OF HOME BROADBAND **BILLS**

Bills Are A Satisfactory Aspect For Home Broadband Users



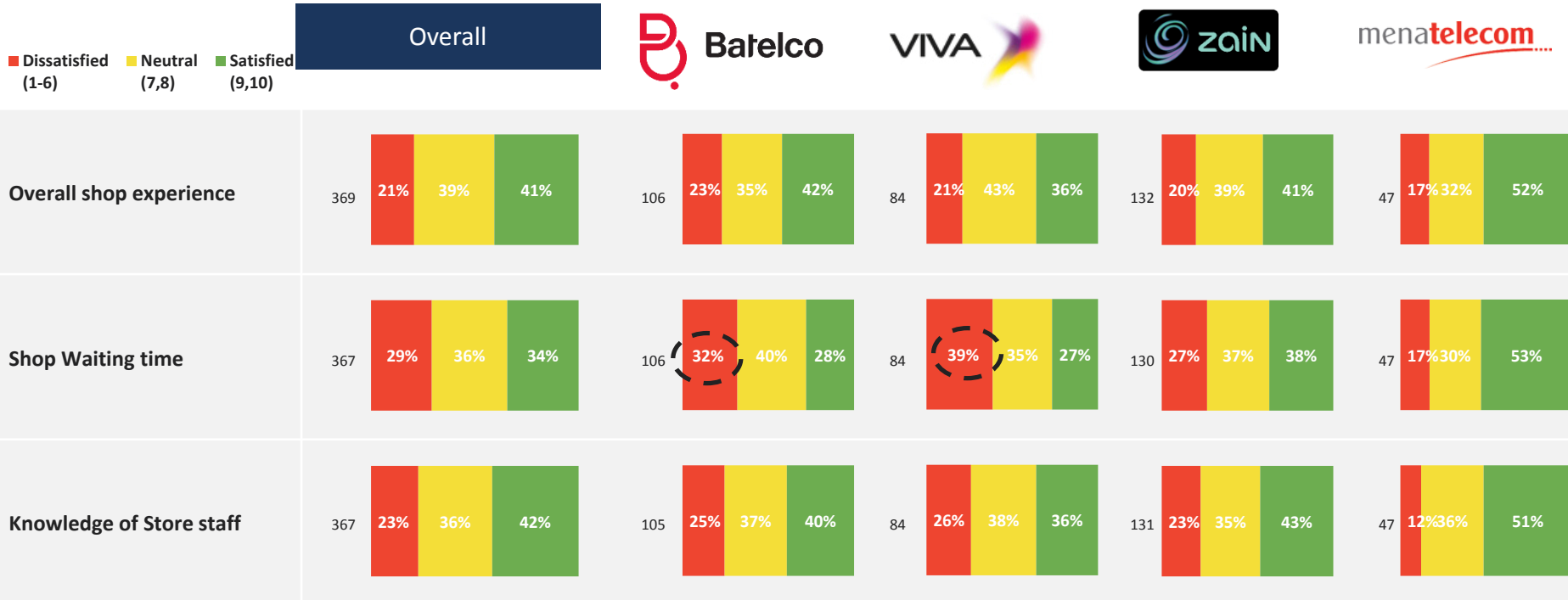


CONSUMER EXPERIENCE WITH HOME BROADBAND ProviderS' SHOPS

SATISFACTION OF PROVIDERS' SHOPS

Consumers Are Satisfied From Shops, Except For Waiting Time

➤ Batelco's & Viva's consumers were dissatisfied from the waiting time in its Shops more other competitors.





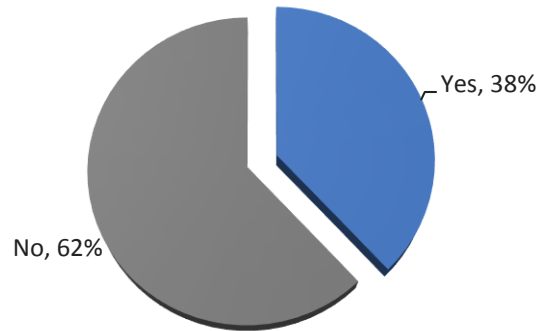
CONSUMER EXPERIENCE WITH HOME BROADBAND ProviderS' CALL CENTER

EXPERIENCING PROVIDERS' CALL CENTER IN PAST 6 MONTHS

One Third Of Home Broadband Users Experienced Call Center

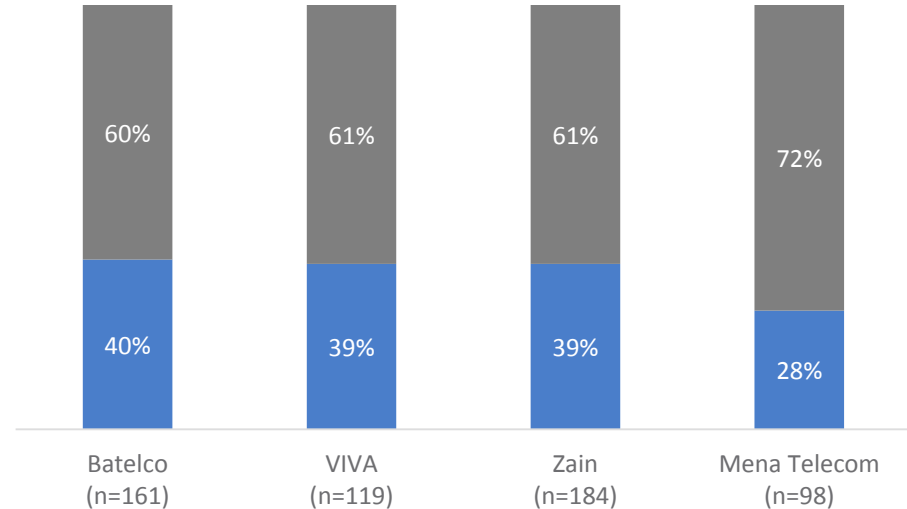
➤ Mena Telecom Subscribers didn't experience call center as much as other Providers subscribers.

Overall



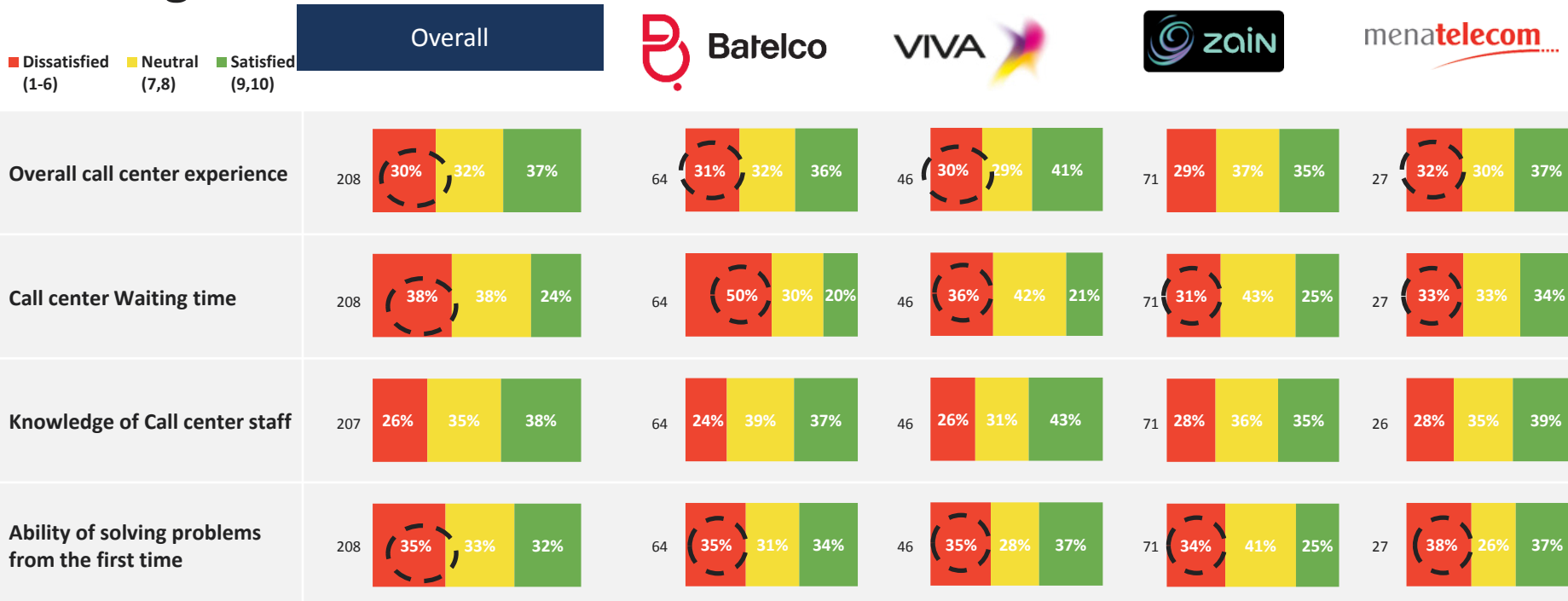
Base: All Respondents; 562

By Provider



SATISFACTION OF PROVIDERS' CALL CENTER

Call Center experience is dissatisfying, specially for Waiting Time, & Solving Problems from First Time





CONSUMER EXPERIENCE WITH HOME BROADBAND ProviderS' COMPLAINT HANDLING

SUBMITTING COMPLAINTS TO PROVIDERS IN THE PAST 6 MONTHS

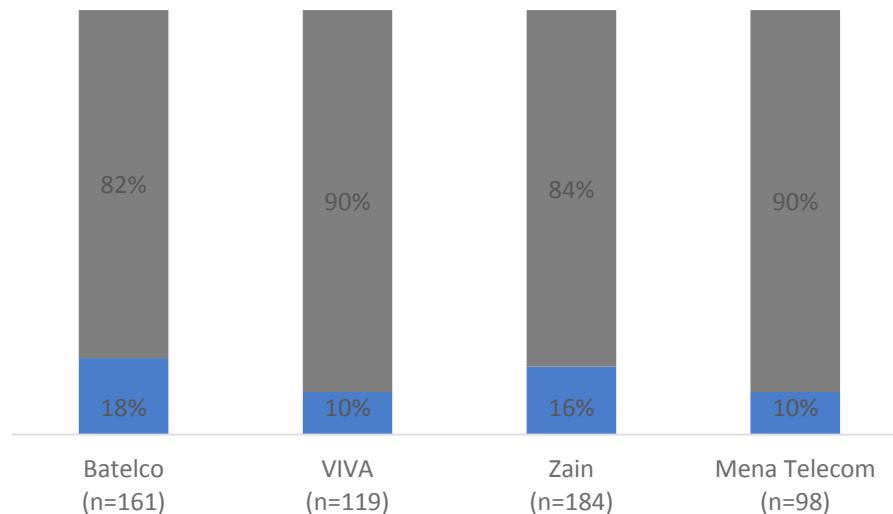
Minority Of Consumers Submitted Complaints To Their Providers Concerning Their Home Broadband Services.

Overall



Base: All Respondents; 562

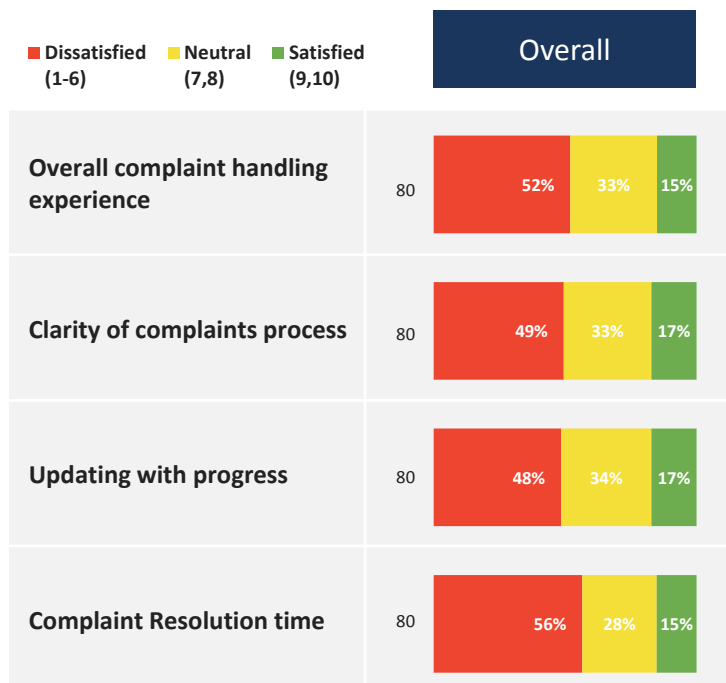
By Provider



SATISFACTION OF COMPLAINT HANDLING

Experience With Complaint Handling Is Not Up To Expectations

- Half of consumers who submitted complaints about their Broadband services are dissatisfied from the way of handling their complaints

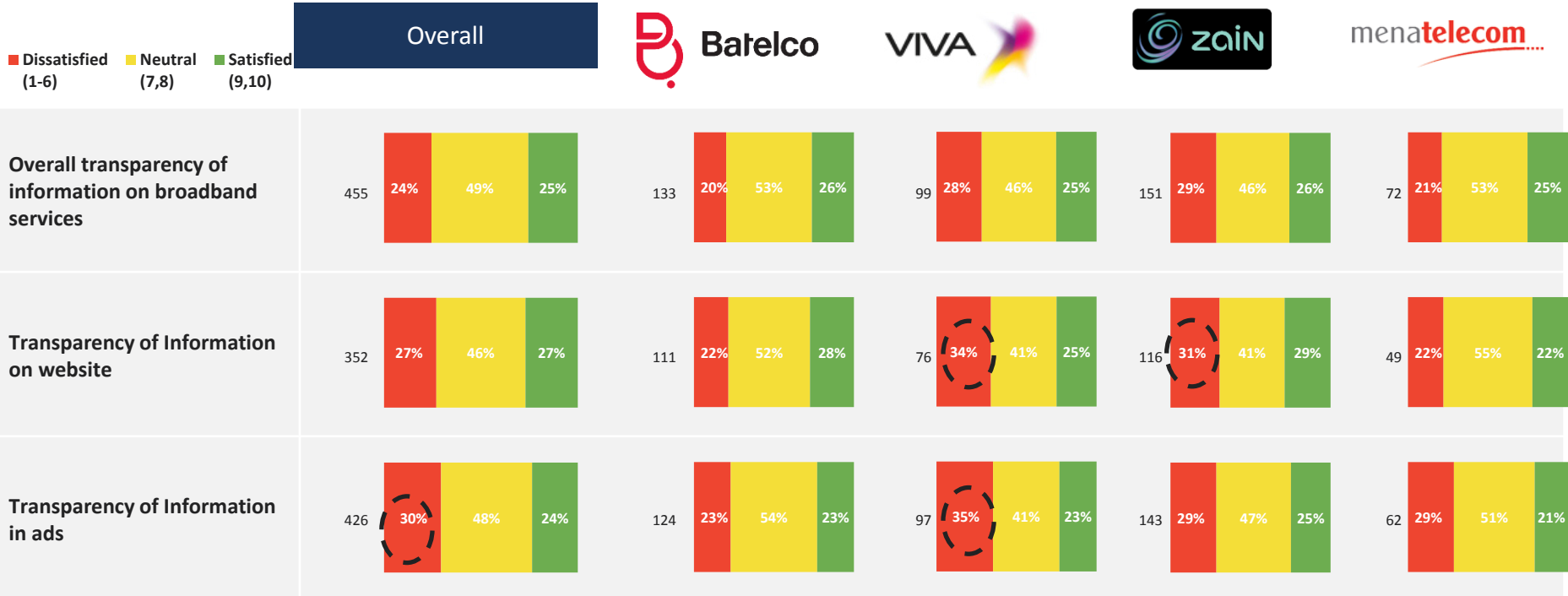


CONSUMER EXPERIENCE WITH HOME BROADBAND ProviderS' INFORMATION AWARENESS

SATISFACTION OF HOME BROADBAND INFORMATION PROVIDED BY PROVIDERS

Subscribers Are Fair Minded About Providers' Communication

➤ VIVA & Zain subscribers showed higher dissatisfaction level for the transparency of information on websites & in ads.



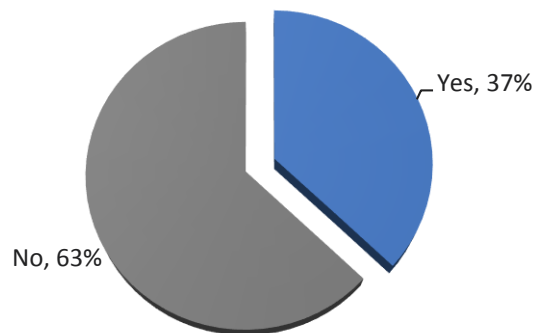


CONSUMER EXPERIENCE WITH HOME BROADBAND PROVIDERS' SERVICE AGREEMENT

HOME BROADBAND SERVICE AGREEMENT

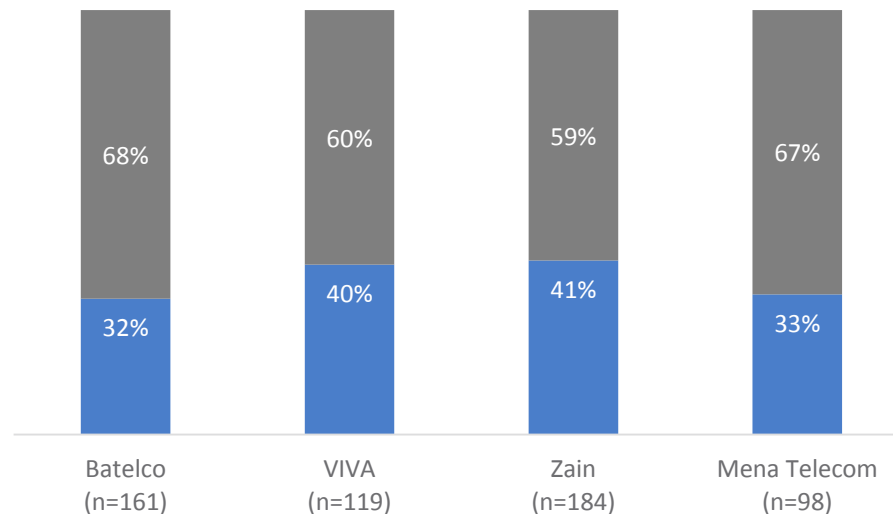
Only One Third Of Home Broadband Subscribers Have Read The Service Agreement Before Signature

Overall



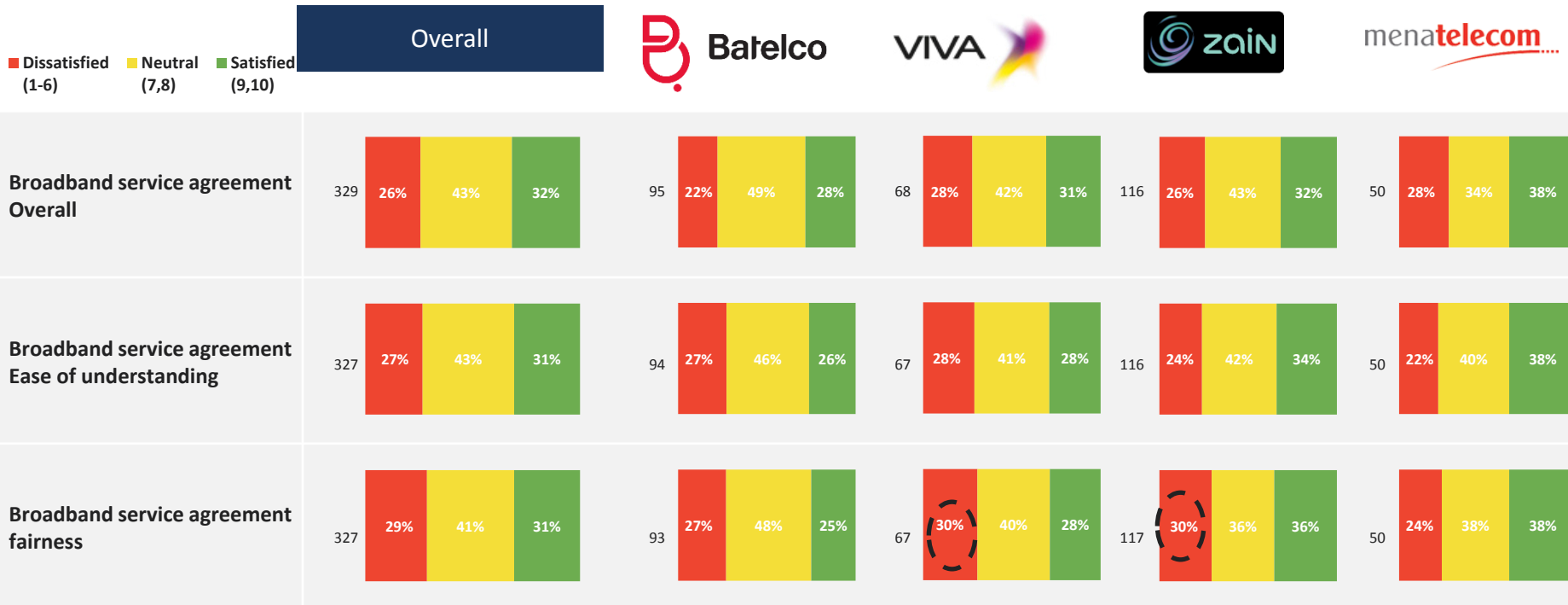
Base: All Respondents; 562

By Provider



SATISFACTION OF HOME BROADBAND SERVICE AGREEMENT

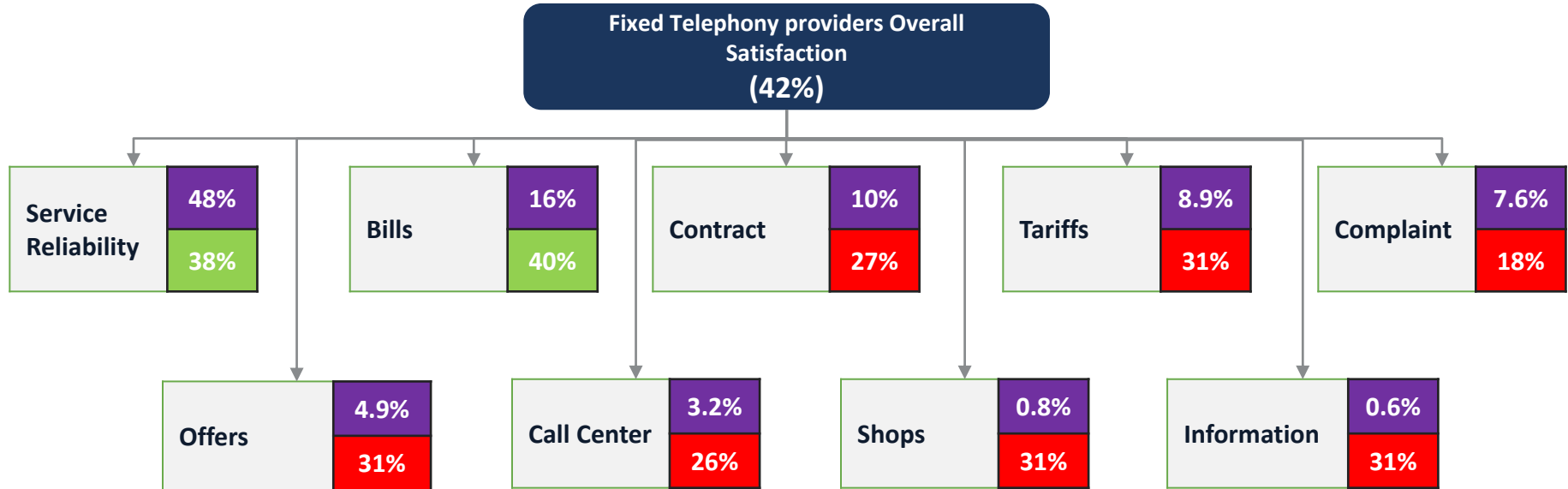
Opinions on Service Agreement Slightly Tilt Towards Satisfaction



FIXED TELEPHONY

SATISFACTION DRIVERS OF FIXED TELEPHONY PROVIDERS– ROOT CAUSE ANALYSIS

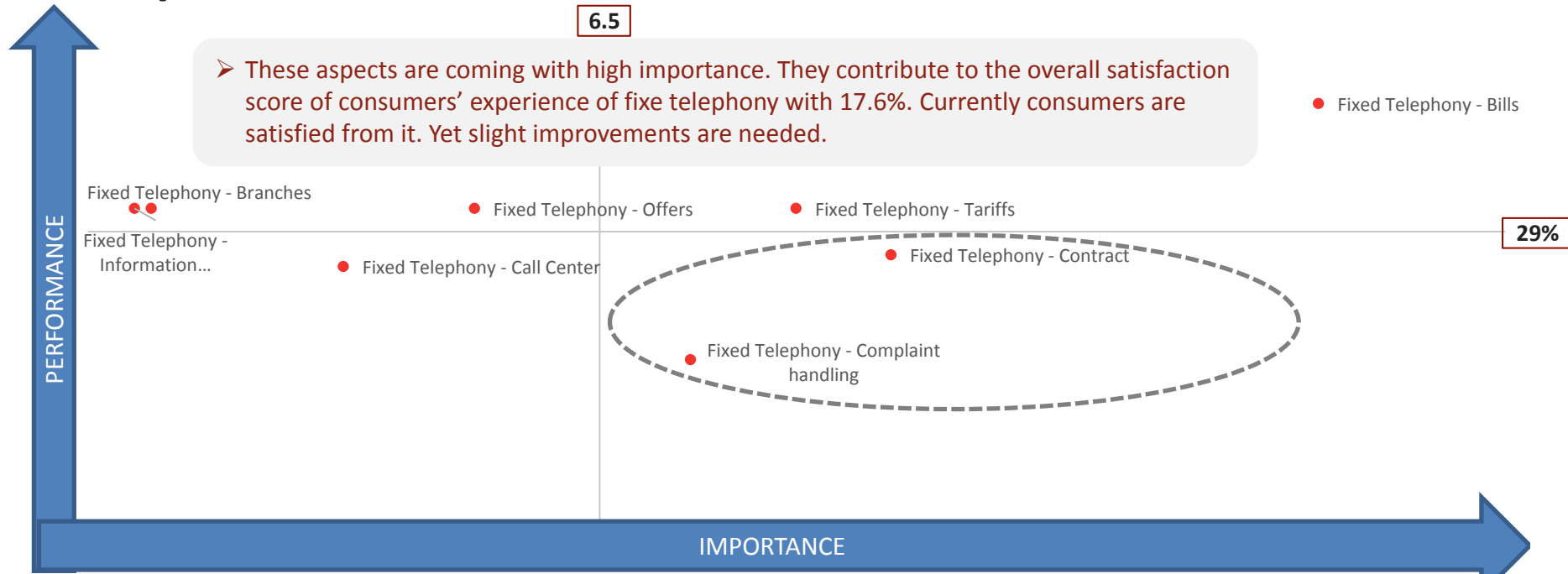
Multiple Challenges Seen For The Fixed Telephony Services.



| Attribute | Impact | |
|-----------|-------------------------|-----------|
| | Satisfaction (9 and 10) | |
| | Above Avg | Below Avg |

ACTION PLAN – IMPORTANCE VS. PERFORMANCE MATRIX

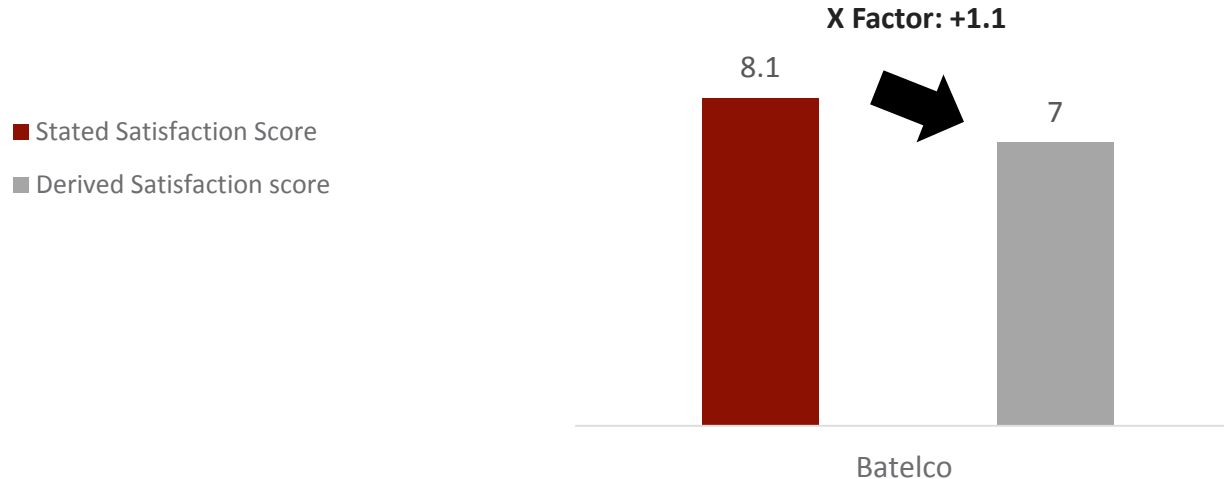
Fixed Telephony Contracts & Complain Handling Are The Key Areas Of Development



SATISFACTION DRIVERS OF FIXED TELEPHONY – SATISFACTION X FACTOR

Consumers' Perception Of Providers Is Increasing The Satisfaction

- The relationship between consumers & their Providers is positively affecting the overall satisfaction score. consumers are not actually satisfied from their experience of different functional touch points (Derived Satisfaction score). However, their perceptions towards their Providers increased their stated satisfaction score. This **X Factor** is the impact of brand perception on the satisfaction score.



Batelco needs to enhance it's functional touch points in order to increase consumers' satisfaction score

What Are Improvements Needed Across Below Average Attributes?

➤ Complaint Handling

Consumers are satisfied from their experience with Fixed Telephony bills. However, their satisfaction score is slightly below their overall experience score. Considering it's high importance and impact on the overall experience score, hence improvement actions are needed. It is recommended:

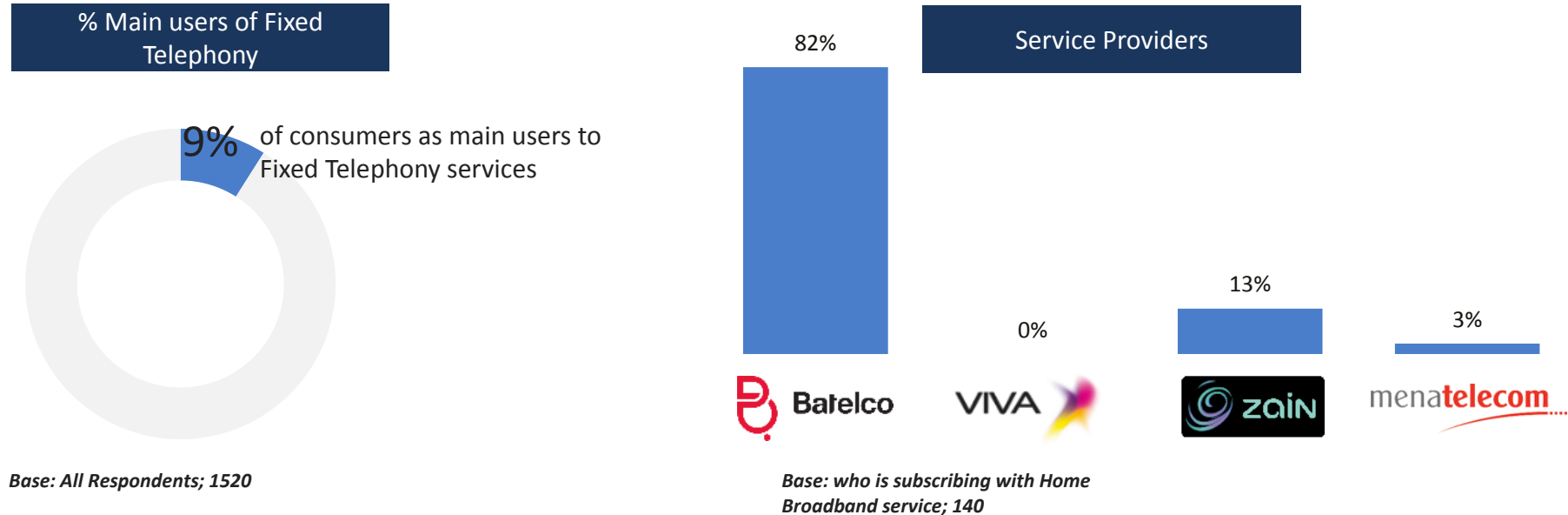
- Providers should ensure sending **Detailed Bills** to their subscribers. This is a key aspect from consumers' experience perspective. Any 1% improvements in this aspect will contribute to consumers' overall satisfaction of fixed telephony experience with 0.065%.
- Further, **Bill Accuracy** is another area of focus. It's the second key aspect in consumers' experience. Any 1% improvements in this aspect will contribute to consumers' overall satisfaction of fixed telephony experience with 0.039%
- .

DETAILED FINDINGS OF FIXED TELEPHONY MARKET

USAGE OF FIXED TELEPHONY SERVICES

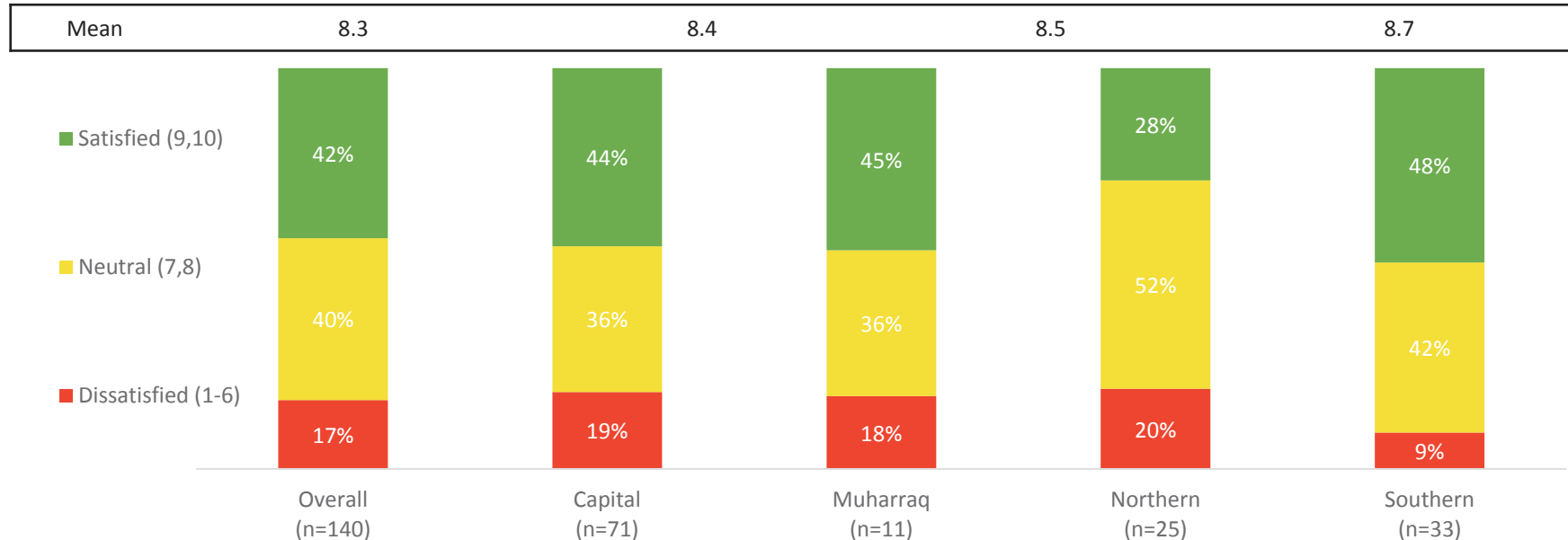
Few consumers Are the Main Users of Fixed Telephony Services

- Batelco is dominating fixed telephony services, with the majority of users subscribing with it (82%)



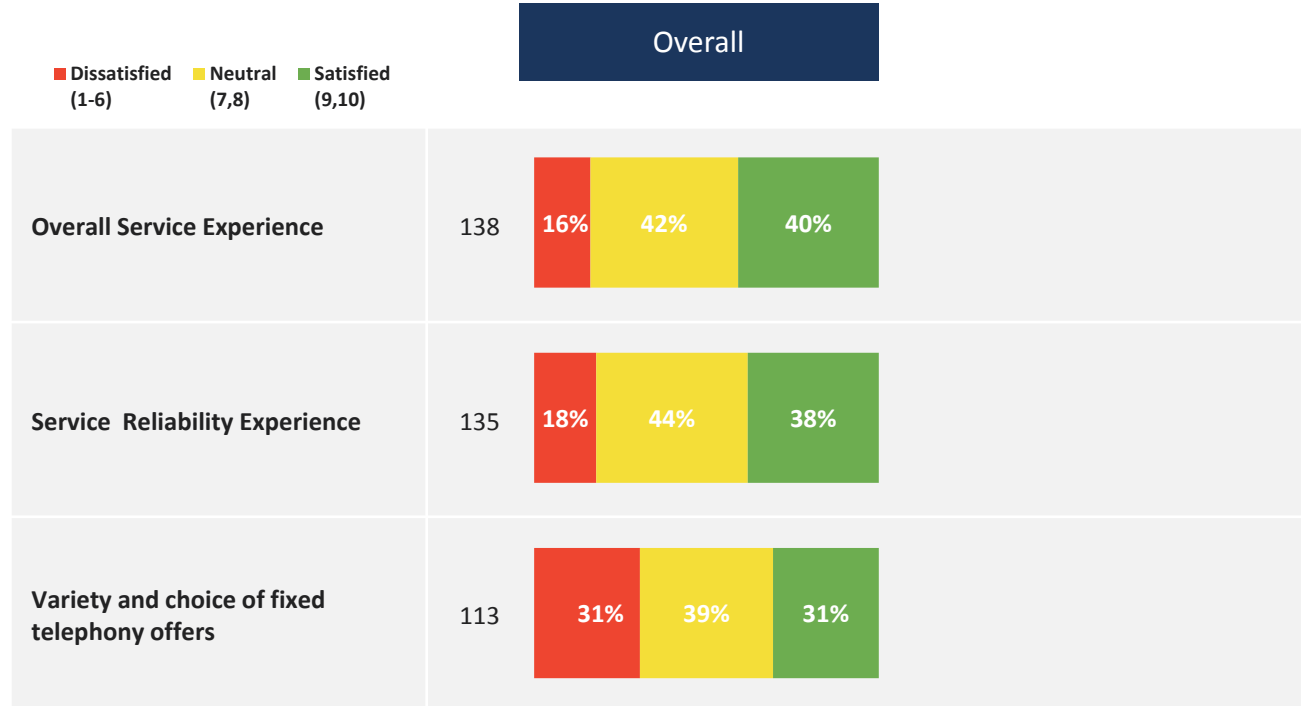
FIXED TELEPHONY OVERALL SATISFACTION BY LOCATION

Fixed Telephony Subscribers Are Satisfied From Their Experience. Satisfaction Is Coming From The Southern governorate.



SATISFACTION OF FIXED TELEPHONY ASPECTS

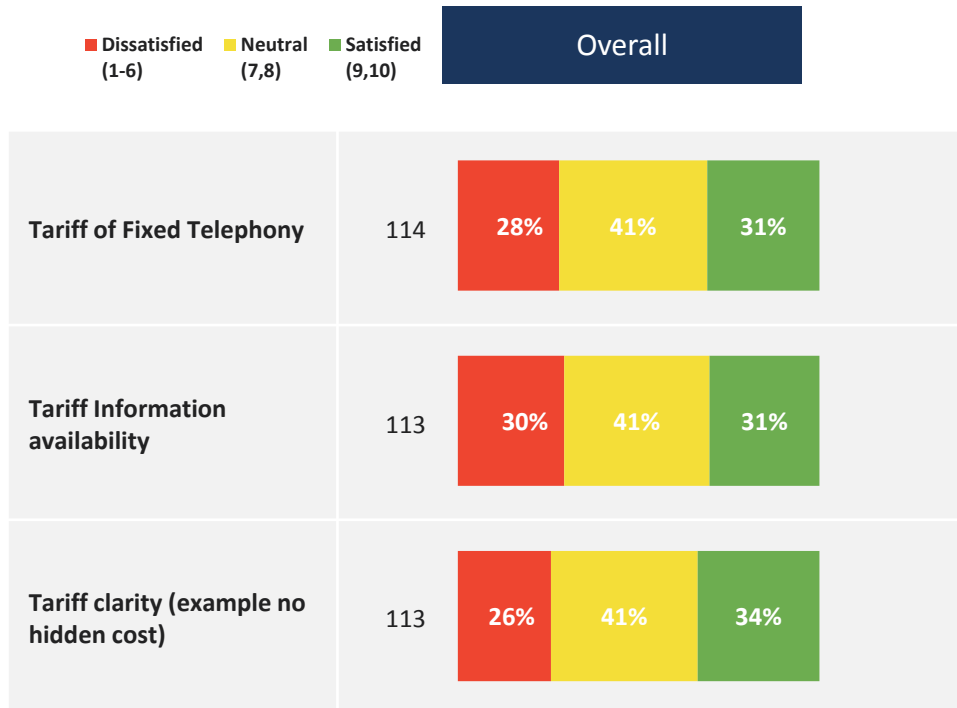
Subscribers Are Satisfied From Service Reliability. Yet Suffered a little From Its Offers.



CONSUMER EXPERIENCE WITH FIXED TELEPHONY PROVIDERS' TARIFFS & BILLS

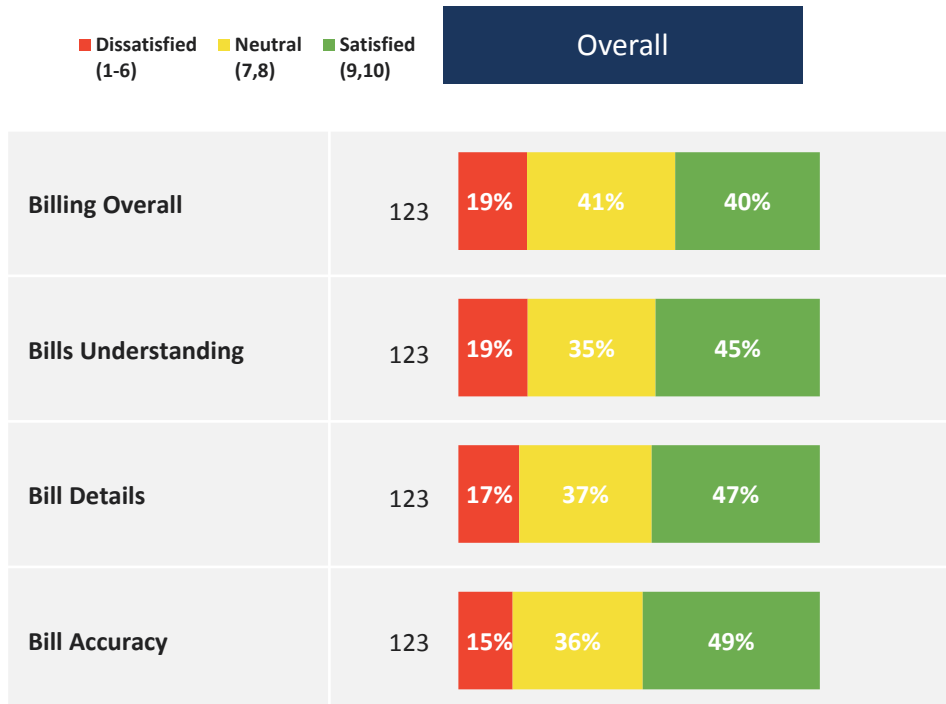
SATISFACTION OF FIXED TELEPHONY TARIFFS

Tariffs Of Fixed Telephony Are Average.



SATISFACTION OF FIXED TELEPHONY BILLS

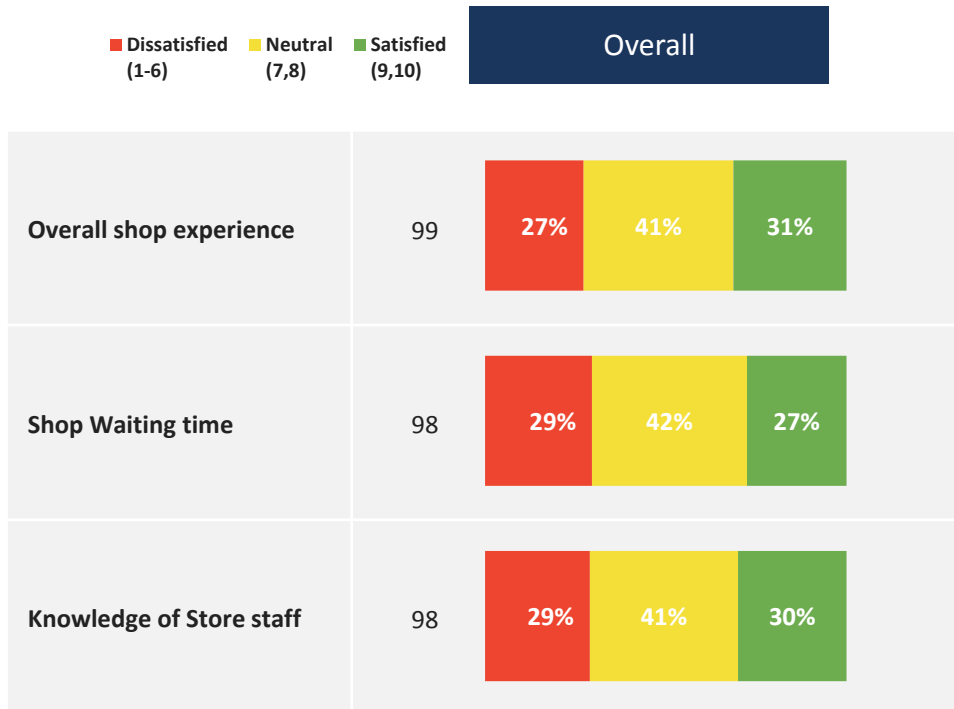
Subscribers Are Pleased & Satisfied From Their Bills



CONSUMER EXPERIENCE WITH FIXED TELEPHONY ProviderS' SHOPS



Subscribers Are Split For Their Experience With Shops.



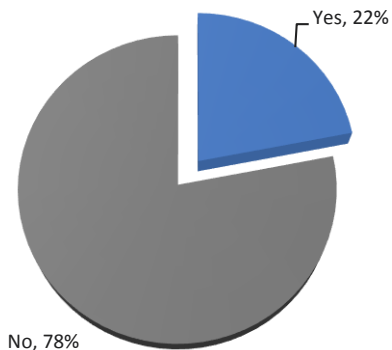


CONSUMER EXPERIENCE WITH FIXED TELEPHONY ProviderS' CALL CENTER

EXPERIENCING PROVIDERS' CALL CENTER IN PAST 6 MONTHS

Minority Had Experienced Call Center, Which Seem To Be A Dissatisfactory Experience

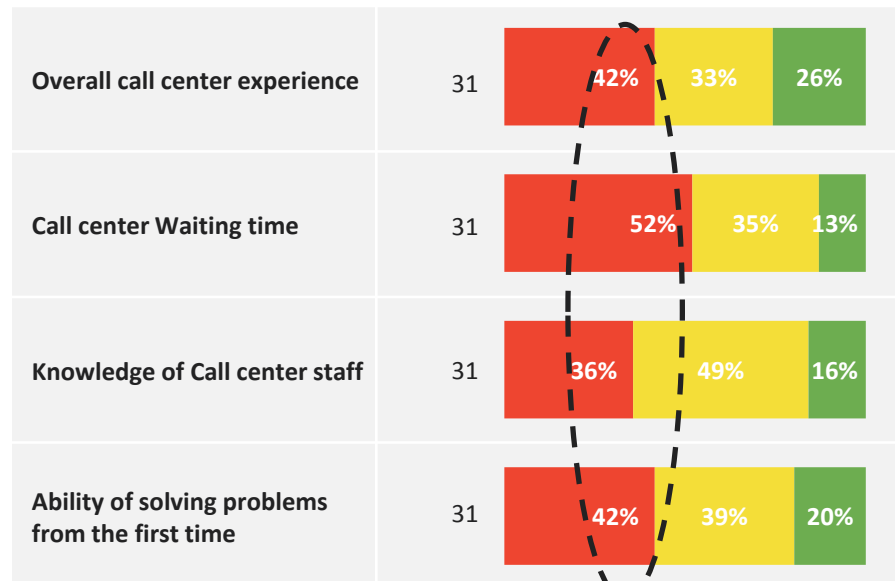
Overall



Base: All Respondents; 140

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

Overall



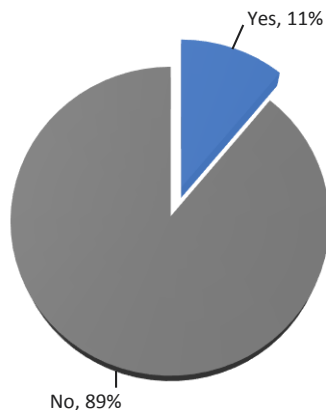


CONSUMER EXPERIENCE WITH FIXED TELEPHONY ProviderS' COMPLAINT HANDLING

SUBMITTING COMPLAINTS TO PROVIDERS IN THE PAST 6 MONTHS

Very Few Subscribers Submitted Complaints Before.

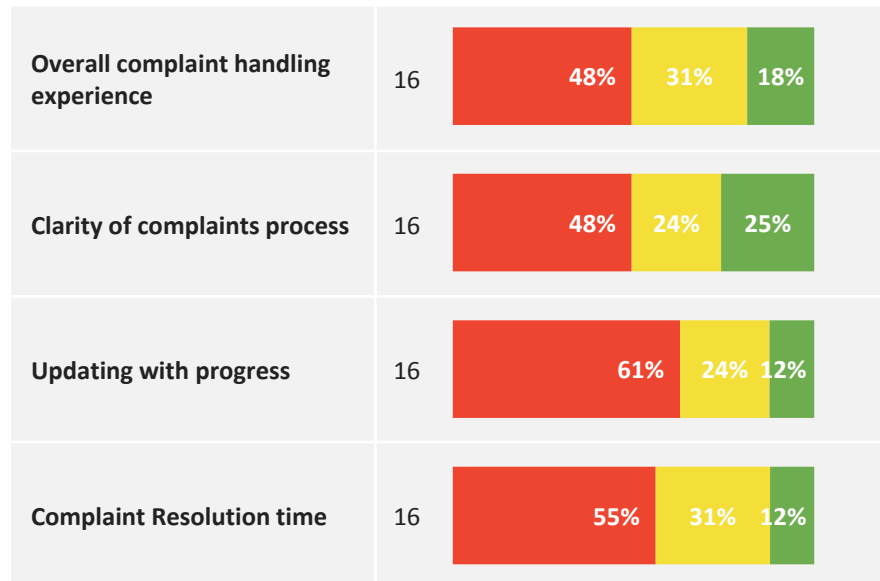
Overall



Base: All Respondents; 140

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

Overall



CONSUMER EXPERIENCE WITH FIXED TELEPHONY ProviderS' INFORMATION AWARENESS

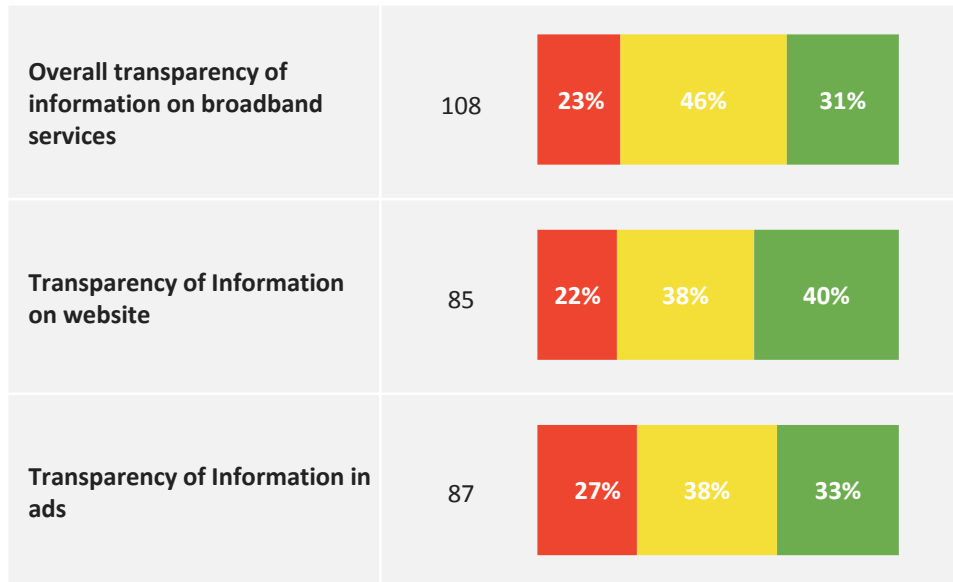


SATISFACTION OF INFORMATION PROVIDED BY PROVIDERS

Subscribers Expressed Their Satisfaction From Information Provided By Providers On Their Website.

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

Overall





CONSUMER EXPERIENCE WITH FIXED TELEPHONY ProviderS' SERVICE AGREEMENT

Around 41% Of Fixed Telephony Subscribers Have Read The Contract.

➤ Opinions expressed are split on service agreement.

Overall

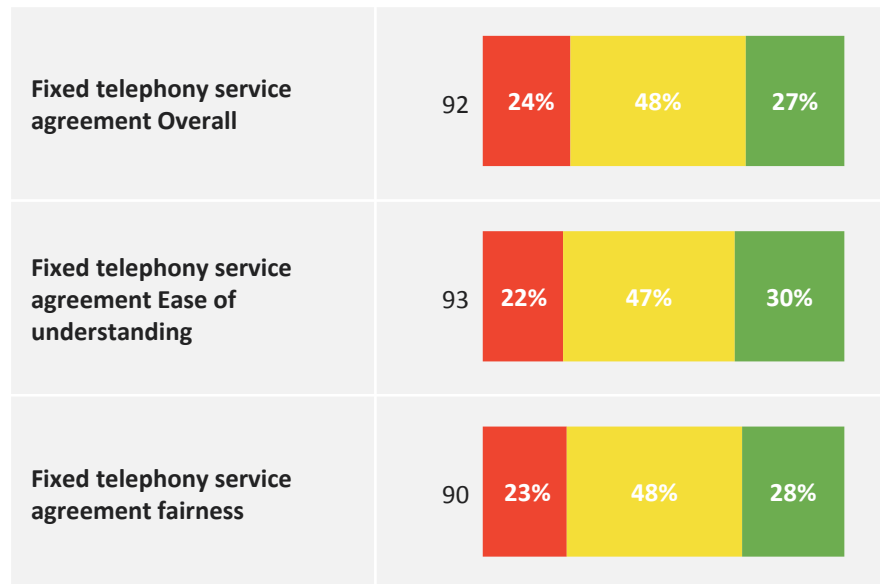


Base: All Respondents; 140

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

Overall

N=140



AWARENESS & PERCEPTIONS TOWARDS TRA BAHRAIN

Summary Of consumers' Awareness & Perceptions of TRA Bahrain

- The awareness of TRA across consumers was very low. Out of total respondents, only 24% heard about TRA before. They got to know about TRA through print ads and word of mouth. Few consumers knew TRA's website, and a much fewer of them correctly identified TRA's Call Center number.
- The role of TRA was unclear across almost half of those who knew it. The few things consumers know about TRA are its role in regulating the telecommunication market, and oversee complaints filed by consumers against Providers.
- The awareness campaigns didn't make it through, neither clicked with consumers. Only few consumers claimed to know their rights as consumers.

DETAILED FINDINGS OF TRA BAHRAIN

AWARENESS OF TRA BAHRAIN

Low Awareness Of TRA Bahrain Among consumers (Only 24%)

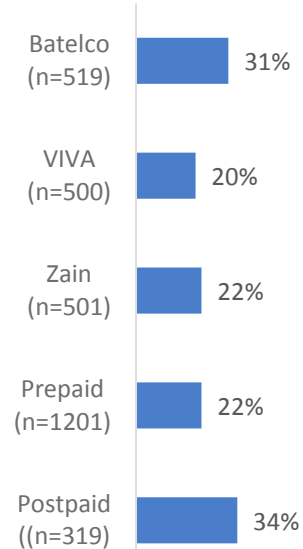
- Majority of Arab expats never heard of TRA Bahrain before.
- Residents of the capital are more updated with TRA Bahrain than other Governorates.

Overall Awareness of TRA of Bahrain

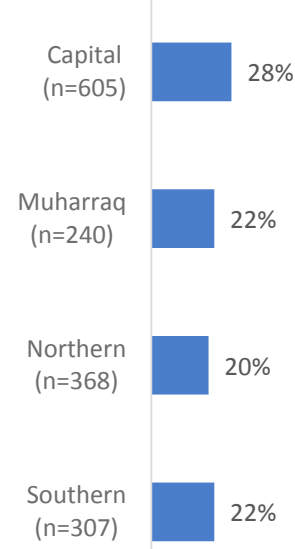


Base: All Respondents; 1520

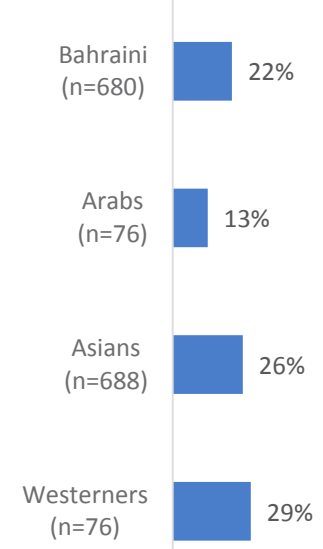
By Mobile Providers



By Location



By Nationality



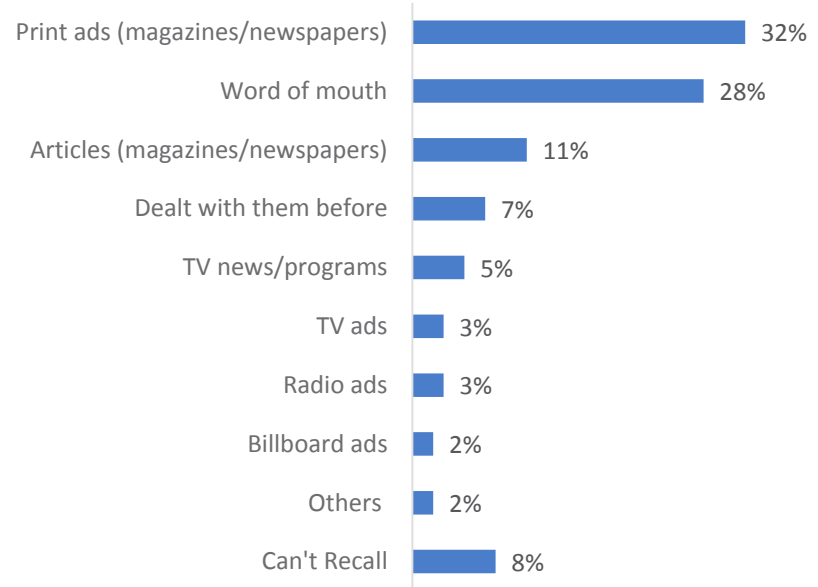
Print ads & Word of Mouth are key sources of awareness for TRA.

Overall Awareness of TRA of Bahrain



Base: All Respondents; 1520

Sources of Awareness



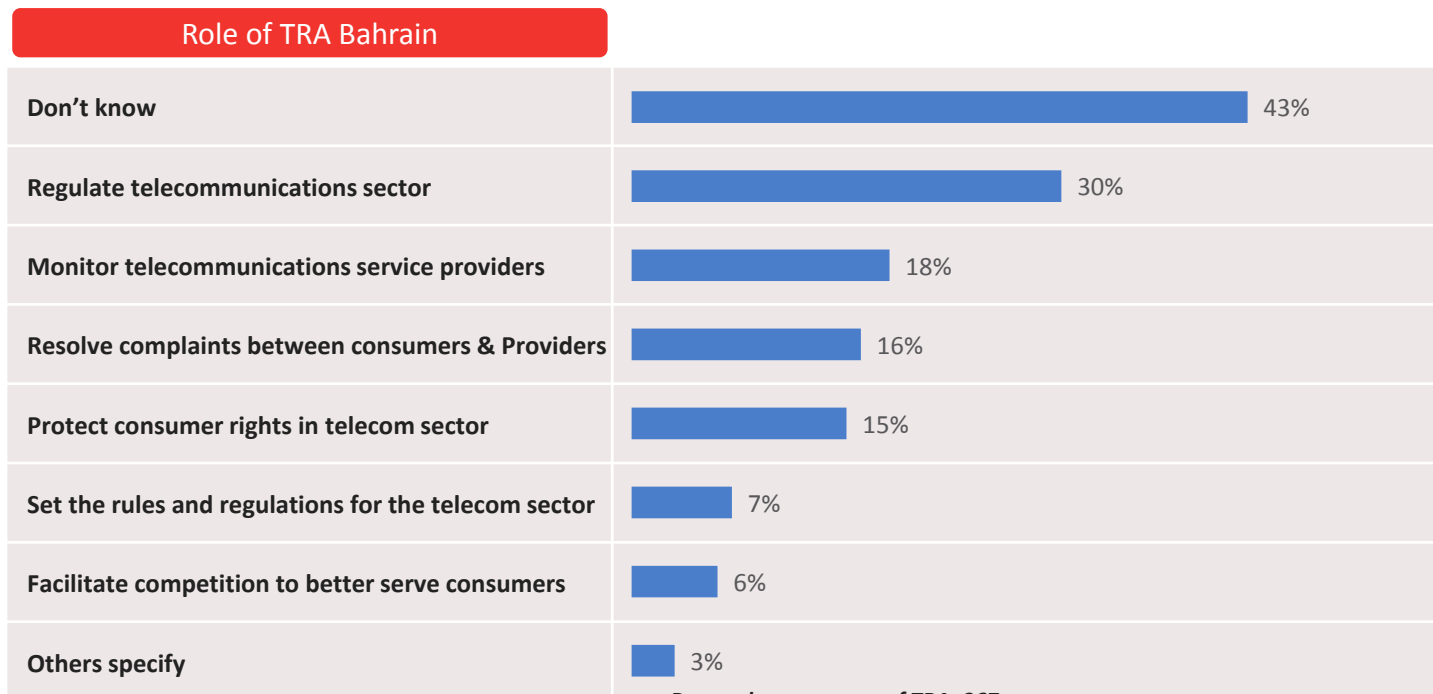
Base: who are aware of TRA, 367

ROLE OF TRA BAHRAIN

THE ROLE OF TRA BAHRAIN

Yet Those Who Heard Of TRA, Don't Know Exactly Its Role.

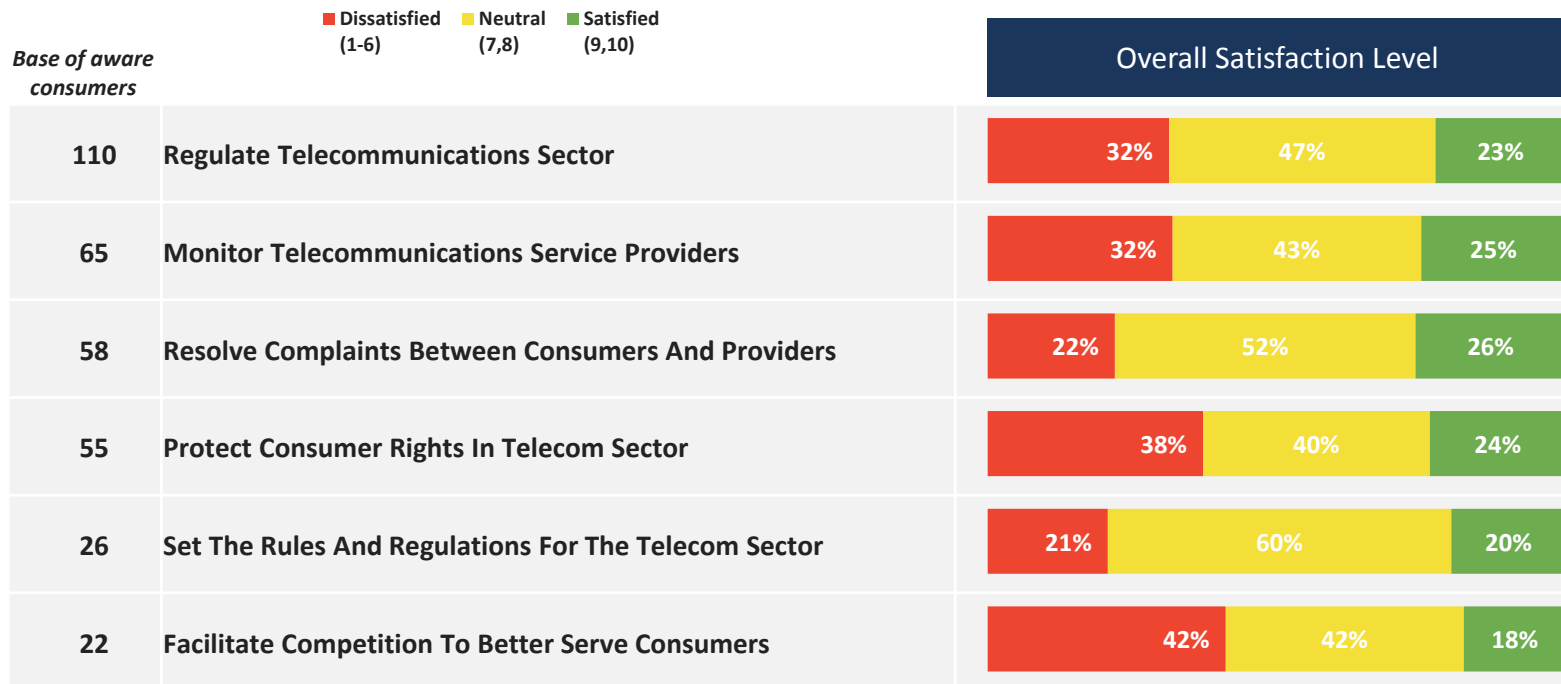
- Only few respondents were able to identify some of TRA roles and responsibilities, mainly “regulation & monitoring the Telecommunication sector”



Base: who are aware of TRA, 367

SATISFACTION OF TRA BAHRAIN ROLE

consumers Had Average Satisfaction Level Of The TRA Role In Bahraini Telecom Market



AWARENESS OF TRA WEBSITE

Among Those Who Are Aware Of TRA, Only 20% Knew Its Website

- Moreover, they are dissatisfied with the clarity of information provided on TRA website. In addition, 36% of them suffered from the level of information about complaint process.

Awareness of TRA Website

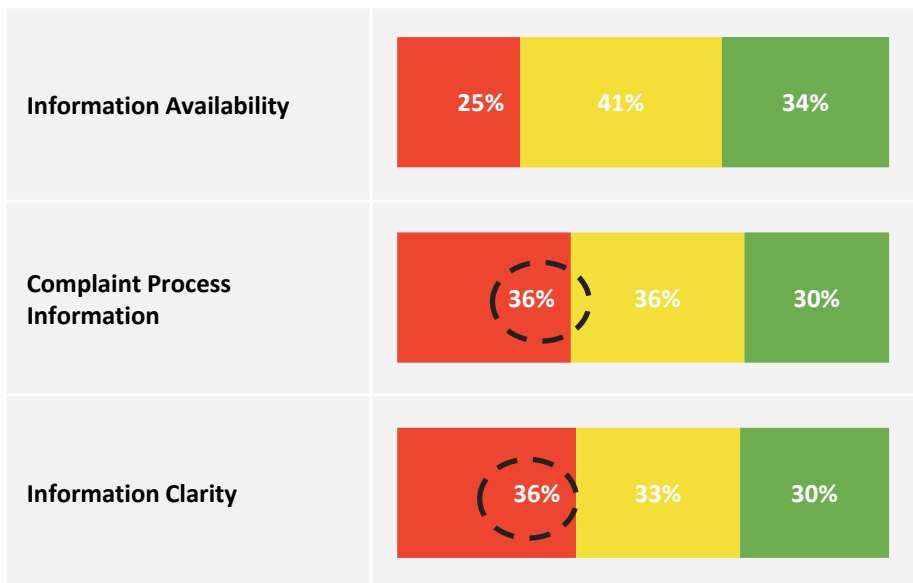


Base: who are aware of TRA; 367

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

Satisfaction of TRA Website

N=73

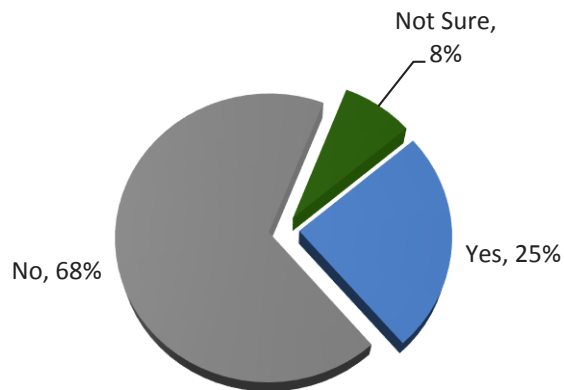


AWARENESS OF CONSUMER RIGHTS

Only 25% Of consumers Claimed To Know Their Rights As Consumers.

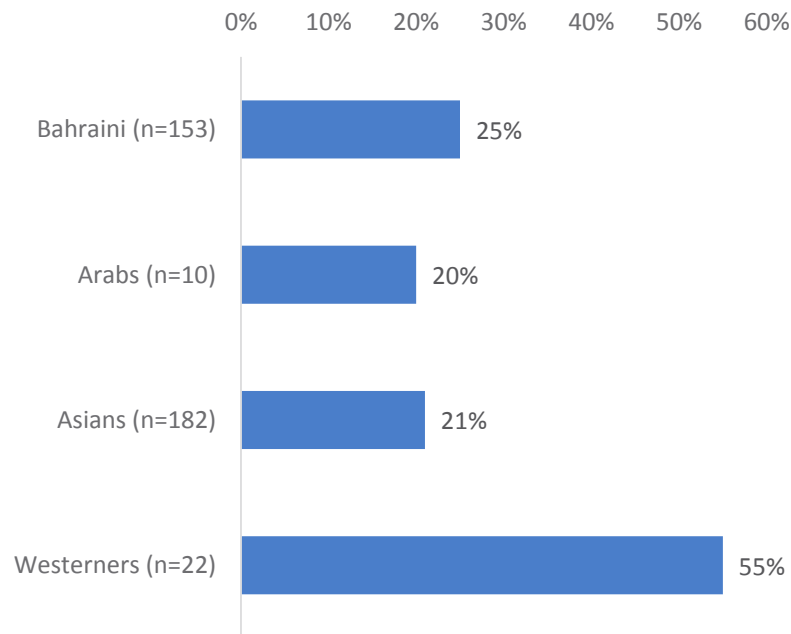
➤ Westerners had the highest awareness of their rights as consumers more than others.

Awareness of Consumer Rights



Base: who are aware of TRA; 367

By Nationality

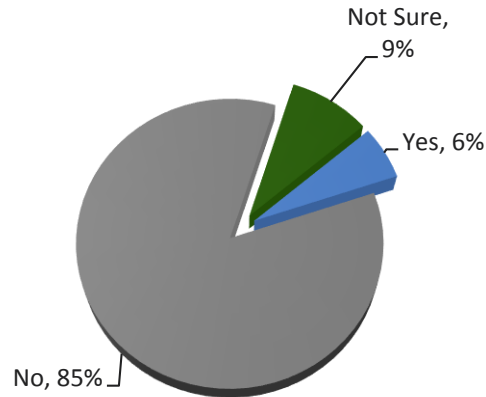


RECOGNITION OF TRA AWARENESS CAMPAIGNS

Awareness Campaigns Failed To Hit With consumers

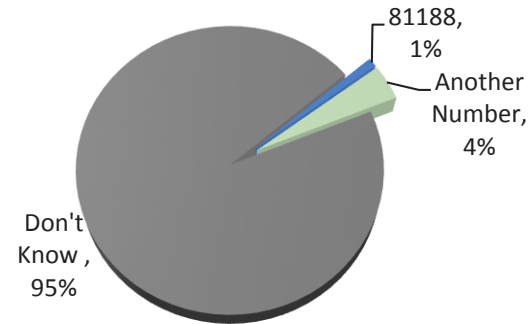
- Only 6% of consumers who are aware of TRA, noticed any awareness campaigns done before.
- On the other hand, only 1% of them were able to correctly identify TRA's Call Center Number.

Seeing TRA Awareness Campaigns



Base: who are aware of TRA; 367

Awareness of TRA Call Center Number





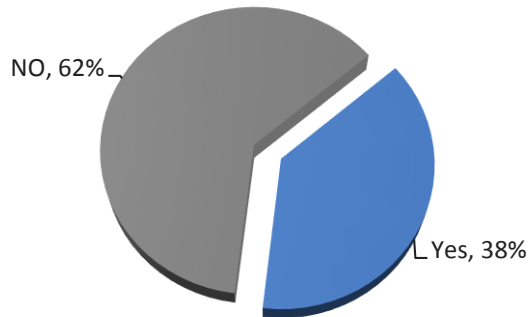
SUBMITTING COMPLAINTS TO TRA OF BAHRAIN

SUBMITTING COMPLAINTS AGAINST PROVIDERS

Some consumers Were Aware With The Ability Of Submitting Complaints Through TRA Against Providers.

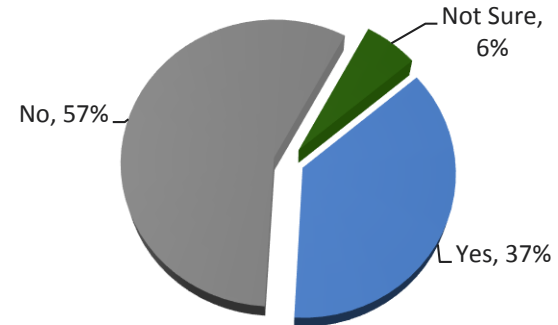
➤ Of them, one third were aware of the complaint process.

Awareness Of The Ability To Submit Complaints With TRA against Providers



Base: who are aware of TRA; 367

Awareness Of The Complaint Process

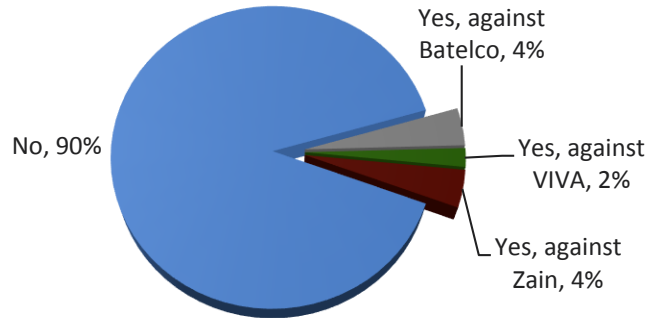


Base: who are aware of submitting complaints through TRA; 138

SUBMITTING COMPLAINTS AGAINST PROVIDERS

Yet, Few consumers Took Actions And Submitted Complaints To TRA.

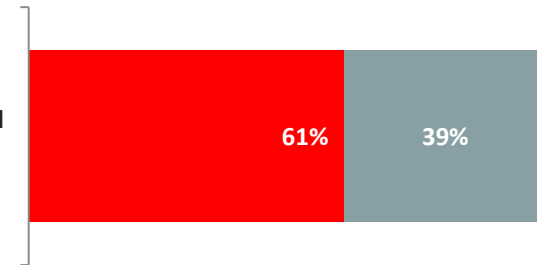
Submitting Complaints against Providers



Base: who are aware of submitting complaints through TRA; 138

■ Dissatisfied ■ Neutral ■ Satisfied

Overall
(n=14)



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