



## TRA BAHRAIN: RESIDENTIAL STUDY

### Telecommunications Services Market Survey for 2016

12 October 2017



هيئة تنظيم الاتصالات  
Telecommunications Regulatory Authority  
مملكة البحرين - Kingdom of Bahrain



# Contents

---

1	
Background and objectives	05

---

2	
Research design	06

---

3	
Key findings	09

---

---

3.1	
Device ownership overview	11

---

3.2	
Fixed line service	13

---

3.3	
Mobile and OTT service	22

---

3.4	
Internet service	40

---

3.5	
International calling	55

---

# Disclaimer

- TRA does not make any representations or warranties, either express or implied, that:
  - the information is free from inaccuracies, errors or omissions;
  - the information is exhaustive;
  - the information is of merchantable quality and fitness for a particular purpose.
- TRA, including its officers, board members, employees, agents and contractors, is not liable for:
  - any inaccuracy, error or omission in the information contained in this document; nor
  - any loss, damage, cost or expense whether direct, indirect, consequential or special, incurred by, or arising by reason of, any person using or relying on the information and whether caused by reason of any inaccuracy, error, omission or misrepresentation in the information or otherwise.
- TRA notes that the information contained in this report is based on a survey of a sample of 1621 residential consumers and as such may not necessarily represent the market or the population as a whole.
- This survey fulfills the requirement to undertake research and publish information as set out in Article 54 of the Law. It also fulfills the requirements of Article 25 to provide information to the Regulator as set out in the Individual Licenses granted to the Operators mentioned in this survey.

# 1

## Background and objectives



# Background and objectives

The key role for TRA Bahrain is to build and regulate a strong telecom infrastructure and induce an environment that would enable growth and benefits for citizens, businesses and the government.

Hence, crucial to understand the current level of service provided to the consumers, associated satisfaction to identify problem areas and look into their future requirements to direct further investments.

This would help remove barriers and ensure the market environment remains abreast of global developments and competitive to fuel growth.

The study objectives therefore looks at evaluating telecom services (fixed voice & data internet, mobile – voice and data, international calls) on the following parameters:

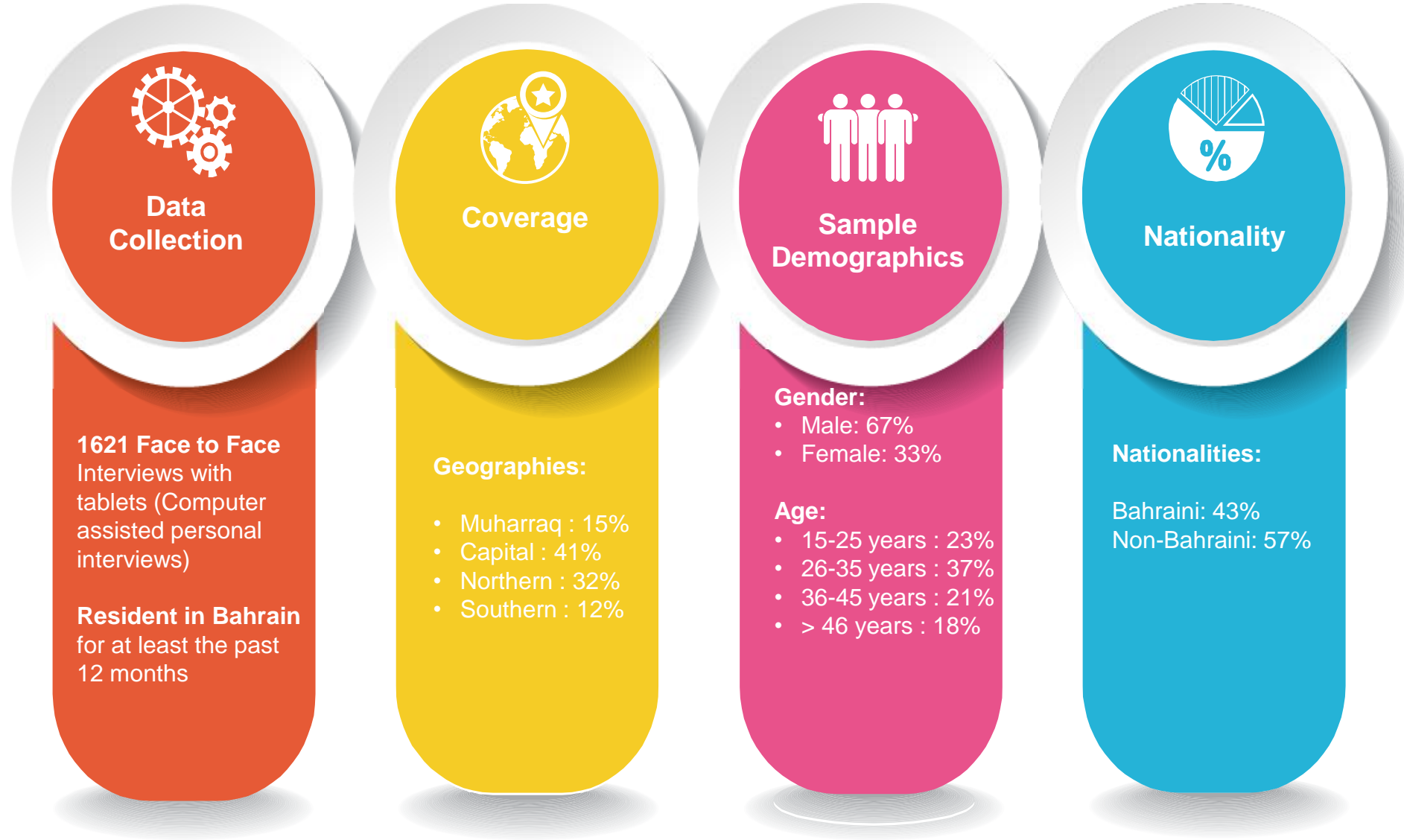
- Access,
- Usage,
- Switching Behaviour
- And Satisfaction.

## 2

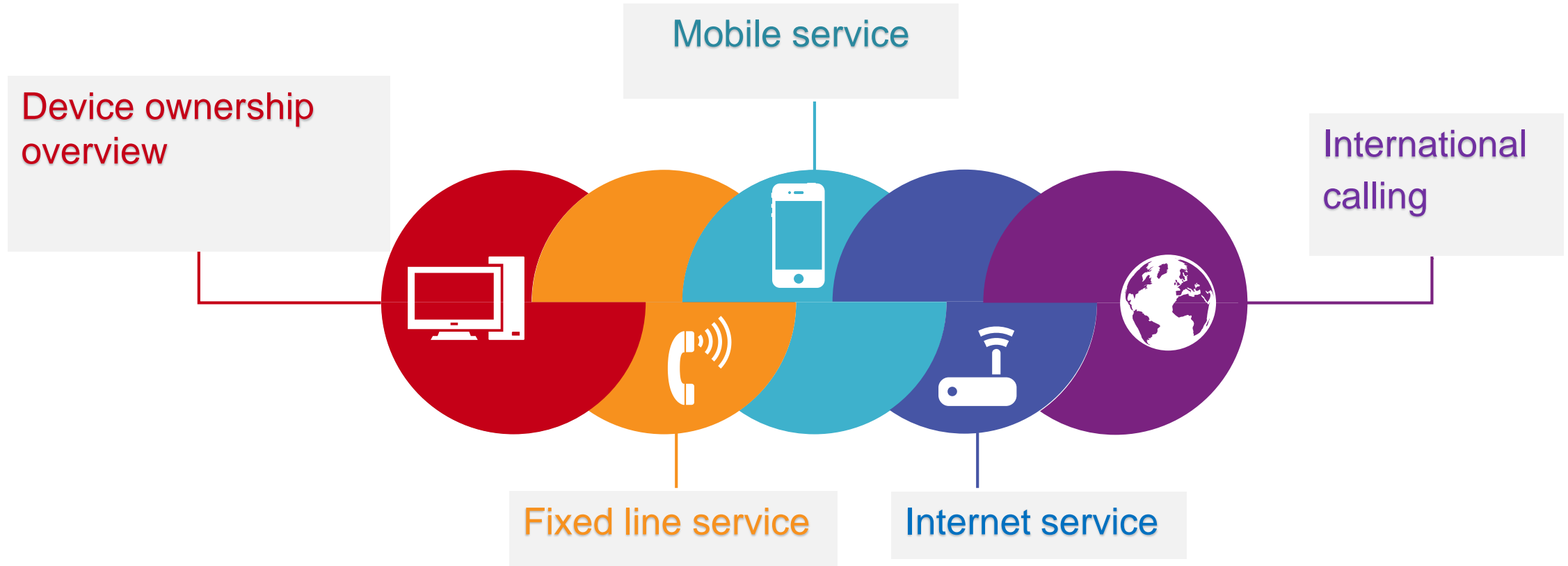
## Research design



# Sample Summary



# Report Map



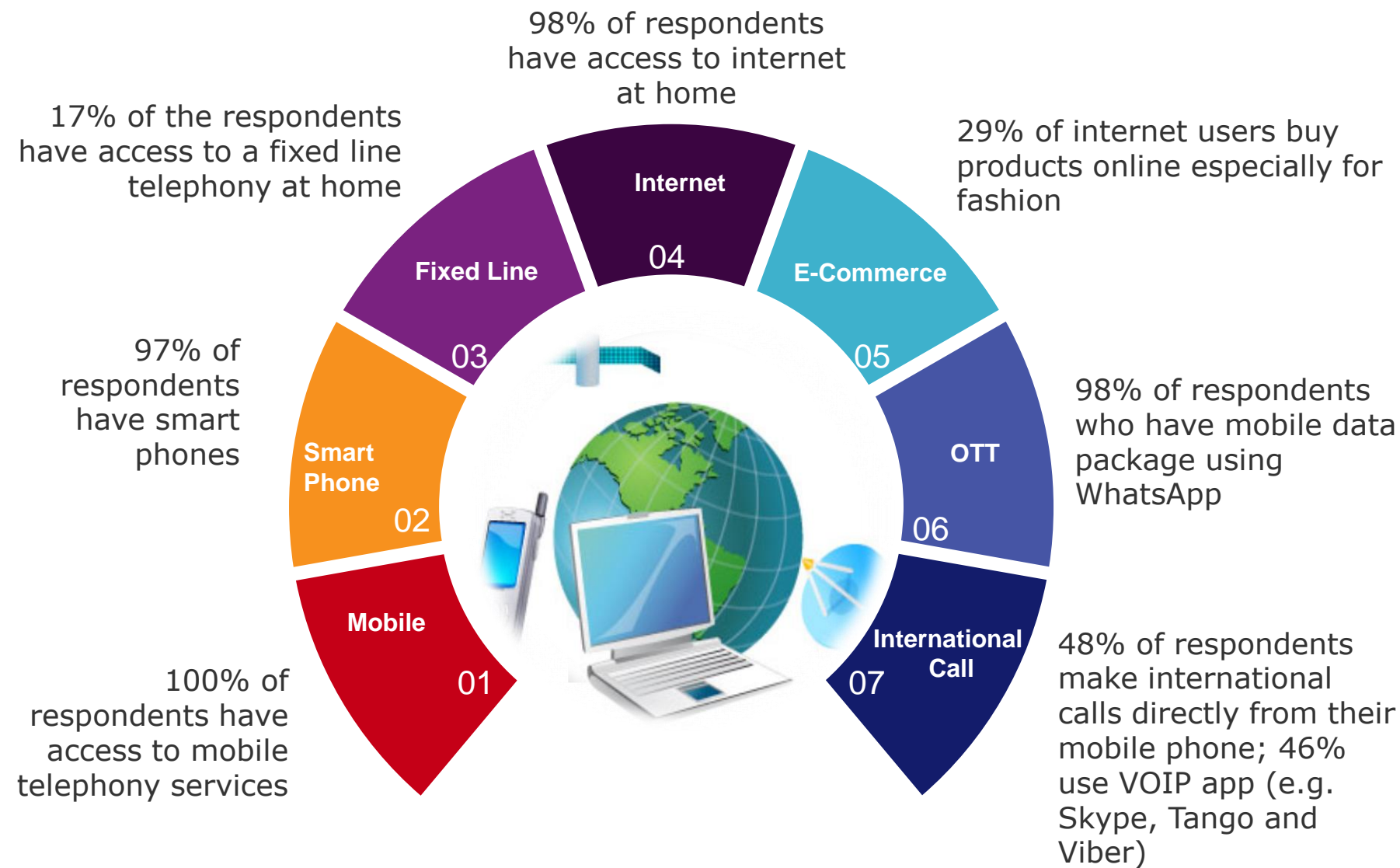


### 3

## Key findings

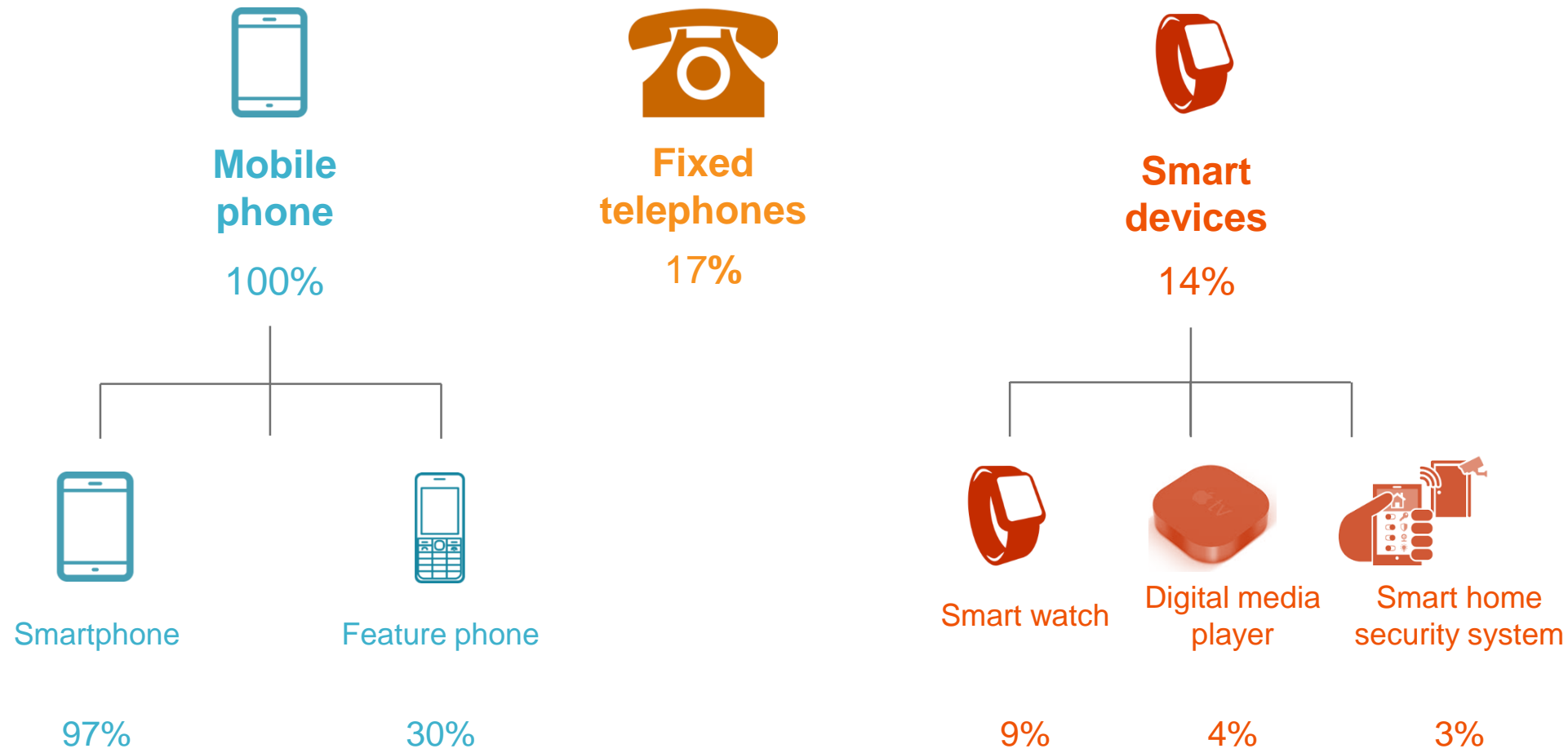


# Key Findings



# Key Findings – Device Ownership

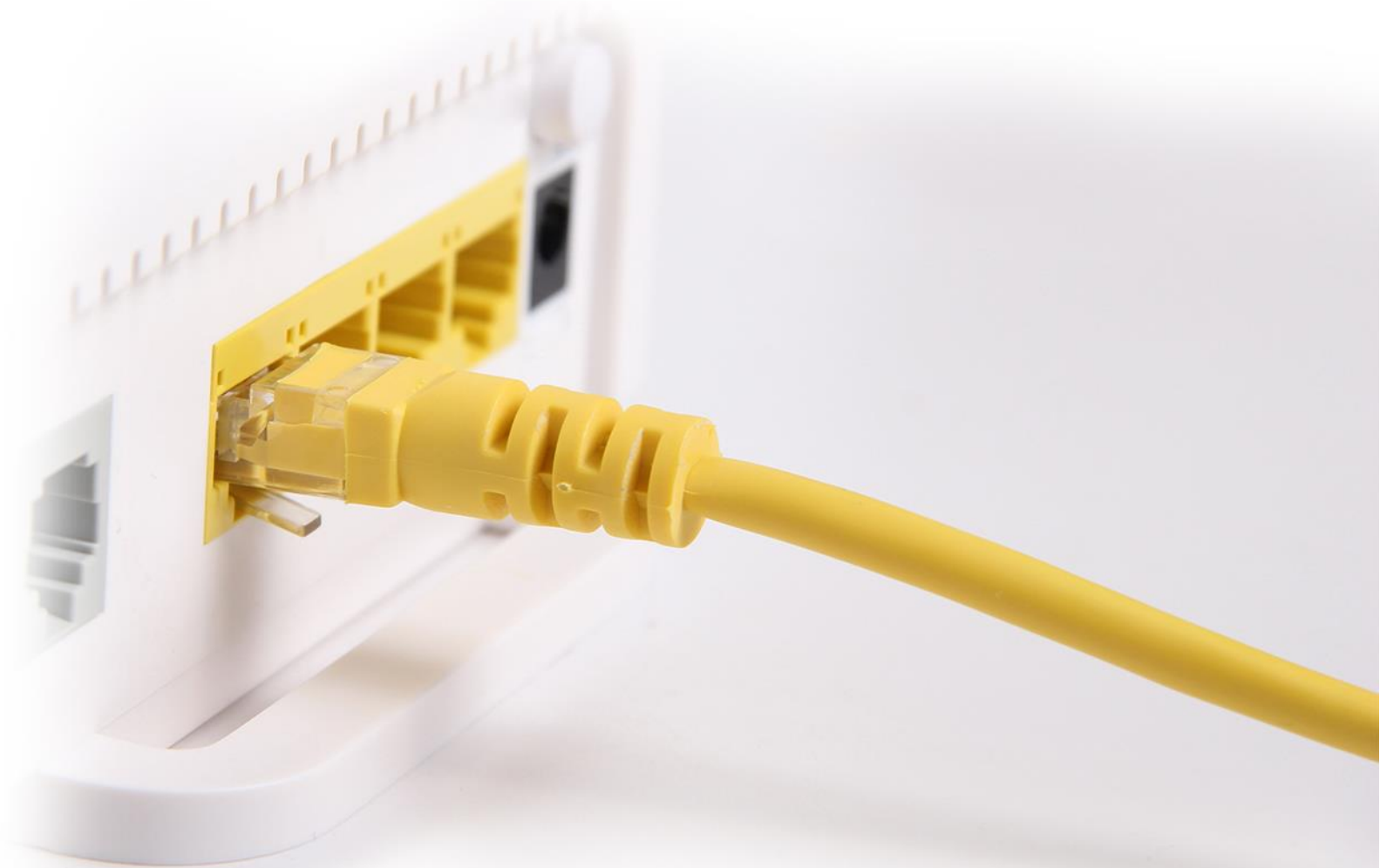
2016  
Base: all respondents



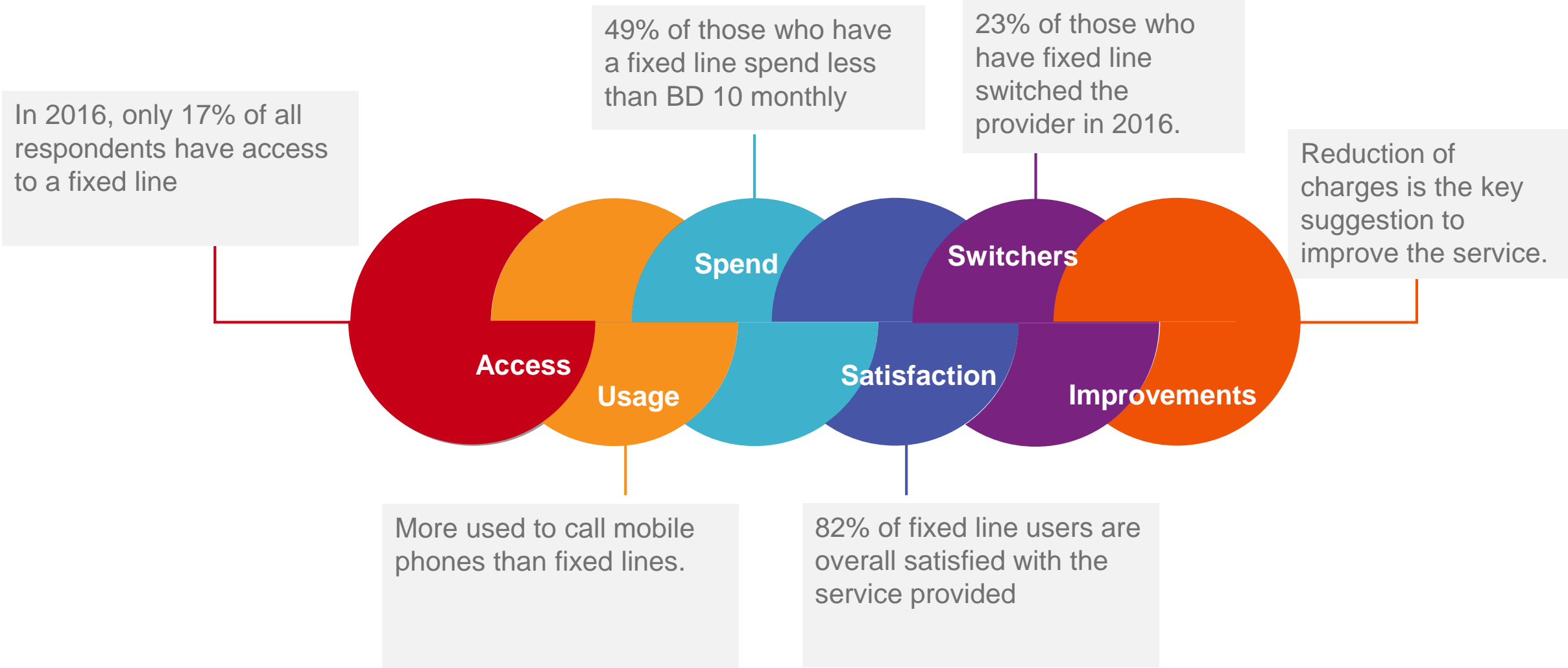
Q. Which of these items do you have in a usable state or a working condition in your house (regardless of whether they are regularly used)?

## 3.2

Fixed lines service



# Key Findings - Fixed line service



17% of the respondents have access to a fixed line in 2016.  
As expected - a higher proportion of calls made from fixed line are made to mobile phones.

**17%** of the respondents have access to a fixed line in 2016.

*Base: all respondents*

**Average  
number of  
calls made  
per week  
to..**

*Base: those  
who have a  
fixed line*



**11**  
**Fixed Line**



**16**  
**Mobile**



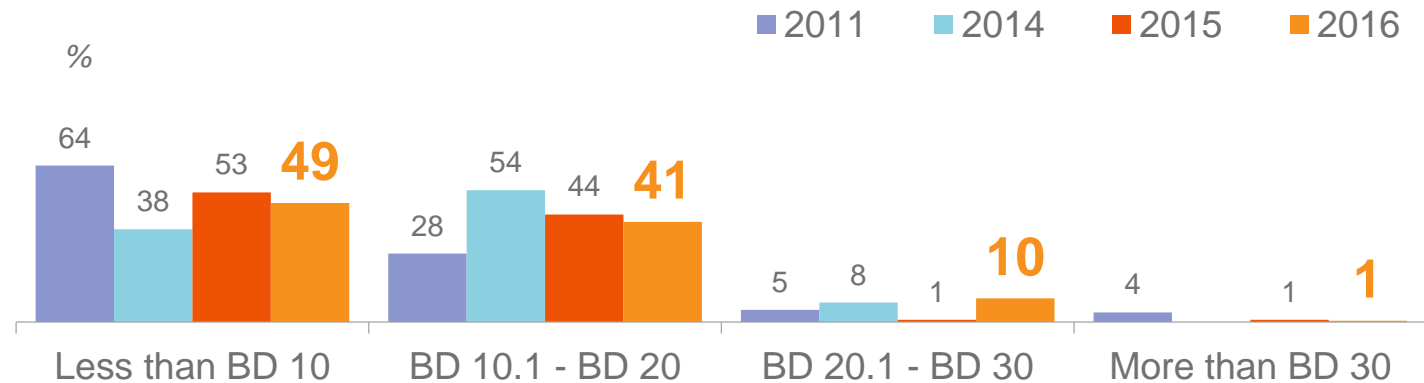
**6**  
**International**

*Q. On an average, how many calls do you make each week (include both weekday/ weekend of 7 days) from your fixed line telephone?*

49% of those who have a fixed line spend less than BD 10 monthly in 2016. Among current users- spends by Expat Arabs lower vs. others.

## Monthly spend on fixed line

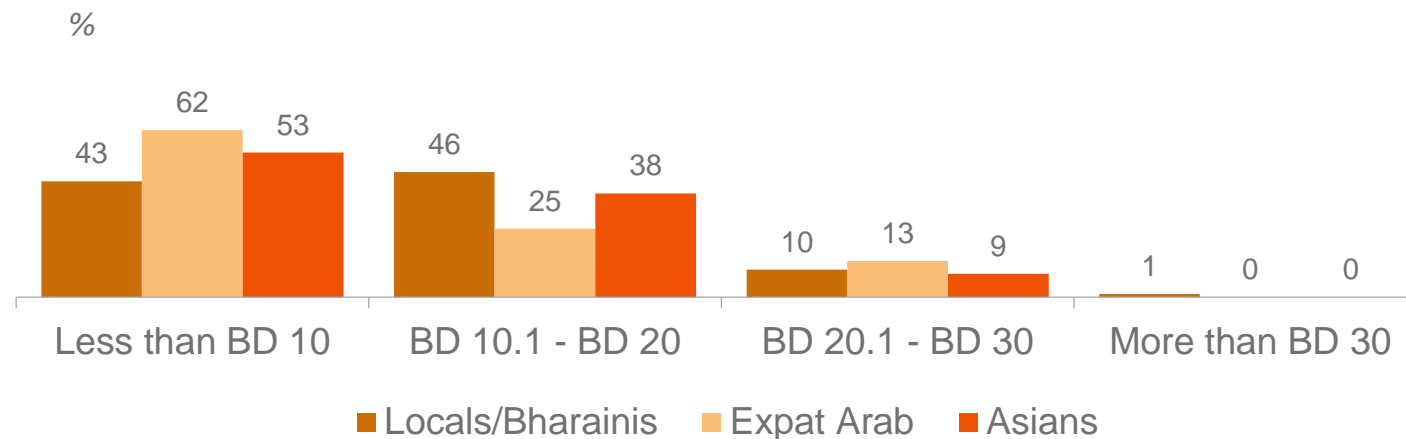
Base: those who have a fixed line



TREND

## Monthly spend on fixed line by Nationalities

Base: those who have a fixed line

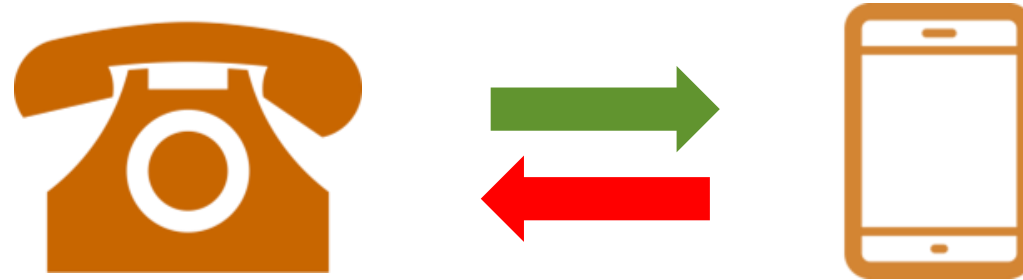


2016

Q. What is your household's average monthly bill on fixed line telephone services? (including international calls)

18% of respondents have cancelled their fixed line and moved to mobile only.

Having a mobile phone is the primary reason for not having a fixed line.



**18% have cancelled their fixed line in the past and moved to mobile only**

11% in 2015

Base: all respondents

### Reasons for not having fixed line

Base: those who do not have a fixed line (multiple response allowed)

Have a mobile phone, so I don't need a fixed line

%



The cost of getting a fixed telephone is too high

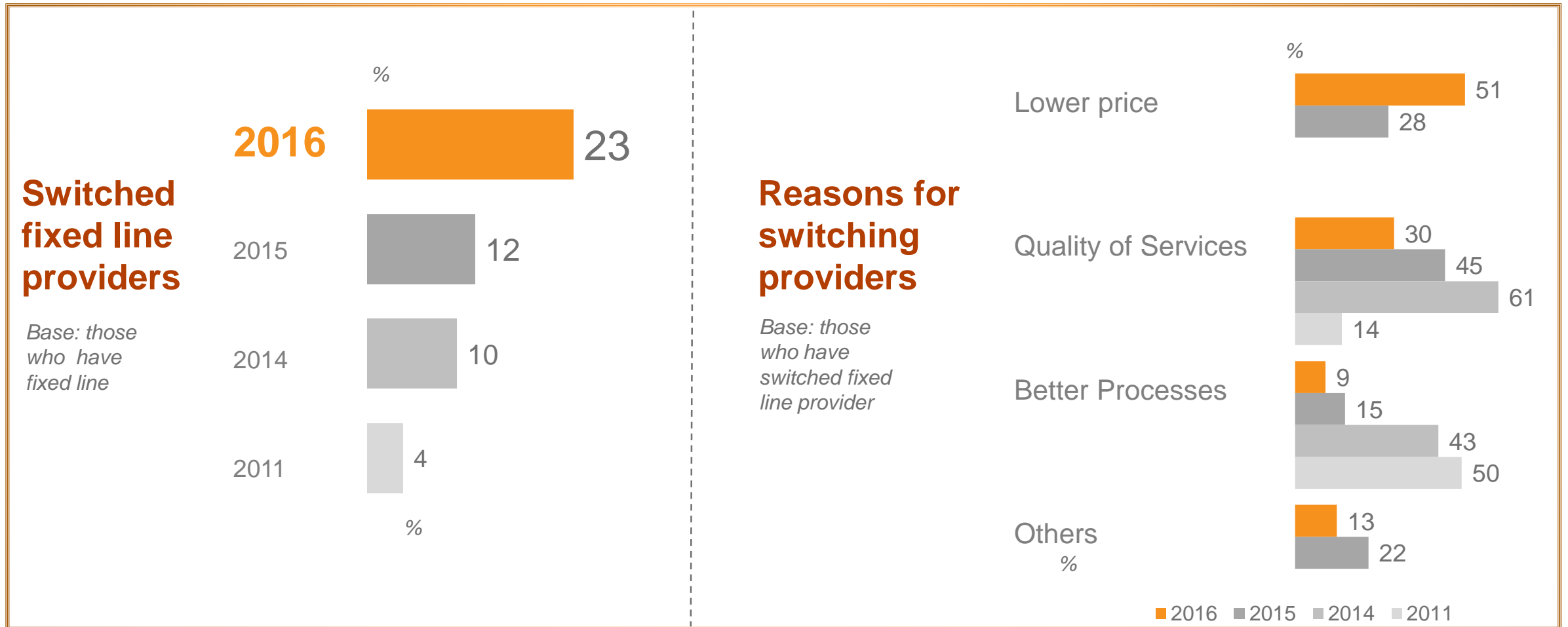


Building that I stay in, is not served by fixed line telephony





23% of those who have fixed line switched the provider in 2016.  
Among those who have switched, the main reason was due to lower price.

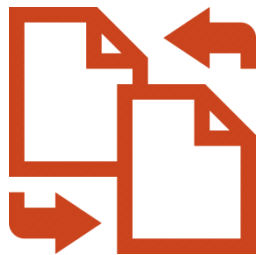


Almost half of the respondents are aware of the Fixed line number portability feature offered with their fixed line connection. 1 in 4 among those who have switched their provider opted to port the number.



46% are aware that they can switch between fixed line providers without changing the number

Base: all respondents



26% of those who have switched fixed line providers done so using number portability

Base: those who have switched fixed line provider

Time taken to install the new line



On the same day    1 - 2 days    3 - 4 days    More than 4 days

Base: those who have switched fixed line provider using number portability

Satisfaction with number portability

Mean

3.69

%

Very satisfied

8

Satisfied

58

Neither satisfied nor dissatisfied

28

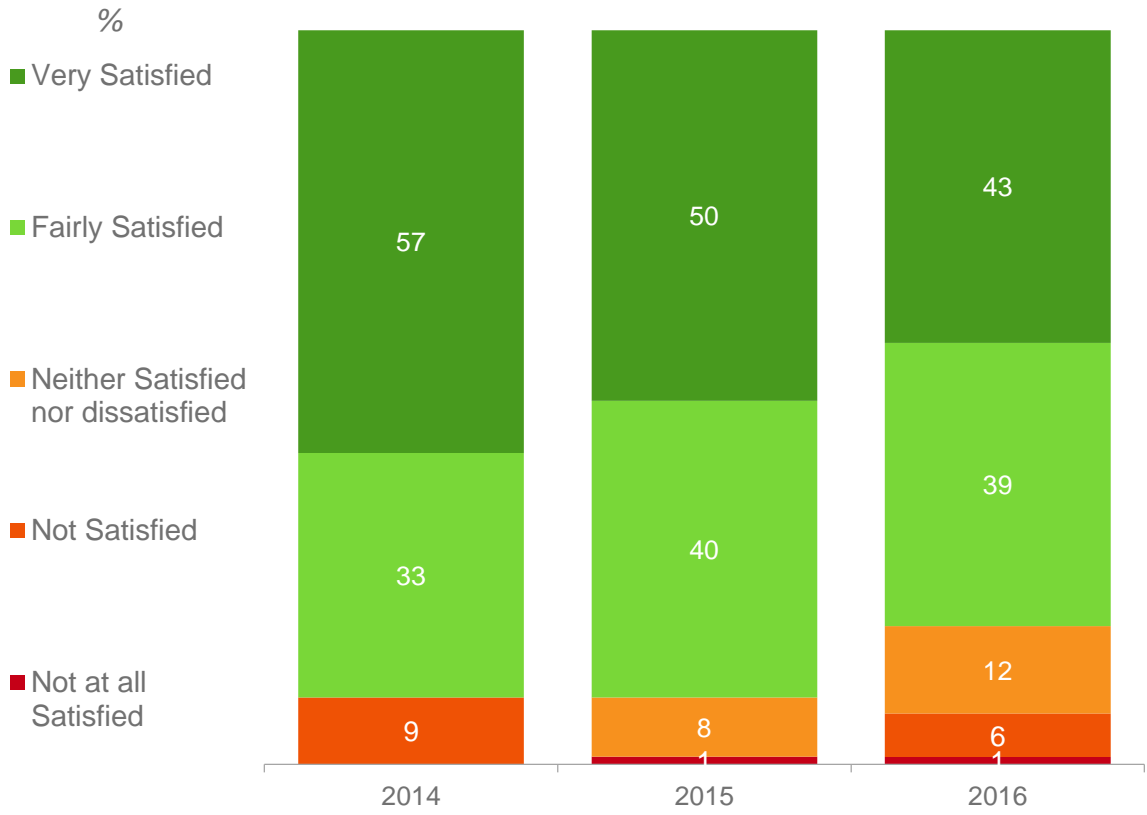
Not very satisfied

6

Base: those who have switched fixed line provider using number portability

Customers are satisfied with the fixed line services in general although overall satisfaction decreased in 2016, especially due to pricing for international calls (largely driven by Asians).

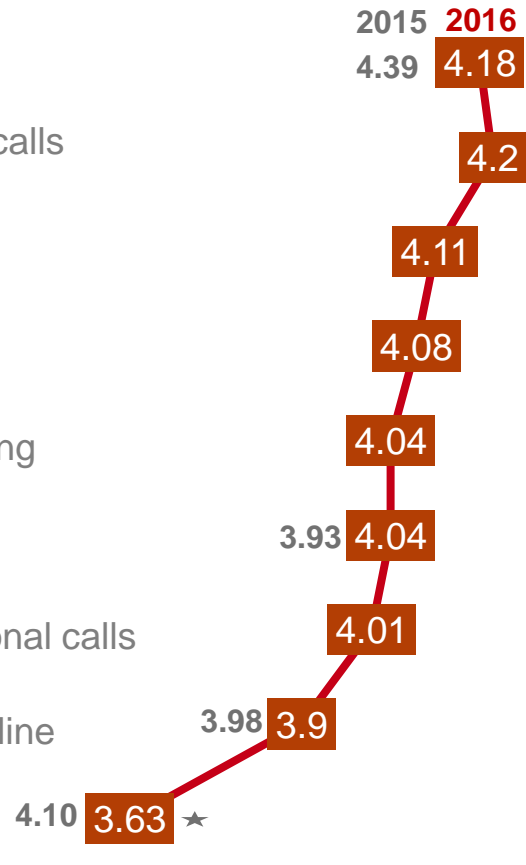
### Fixed line Overall Satisfaction through the years



### Overall fixed telephone service

- Quality of voice while making national calls i.e. within Bahrain
- Ease of billing
- Transparency and clarity of offers
- Ability to make calls without call dropping
- Quality of the customer services
- Quality of voice while making international calls
- Price of national calls made from fixed line
- Price of international calls made from fixed line

Mean score: Scale 1 to 5



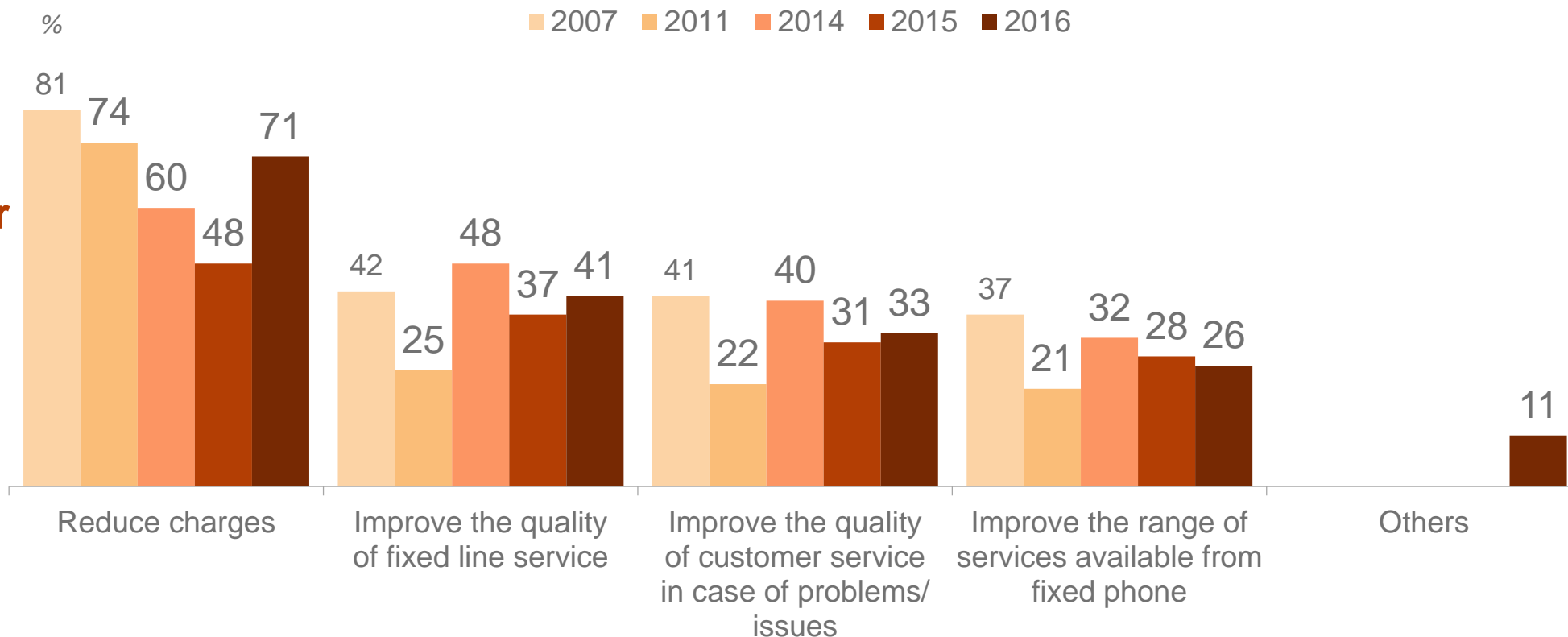
Q. How satisfied are you with the following elements of your fixed phone services?

★ Largely driven by Expat

Reduction of charges is the key suggestion to improve the service.

## Suggestions for improvement

Base: those who have a fixed line



Q. Could you please tell me if there are any suggestions you would like to make to help serve you better in the future for fixed line?

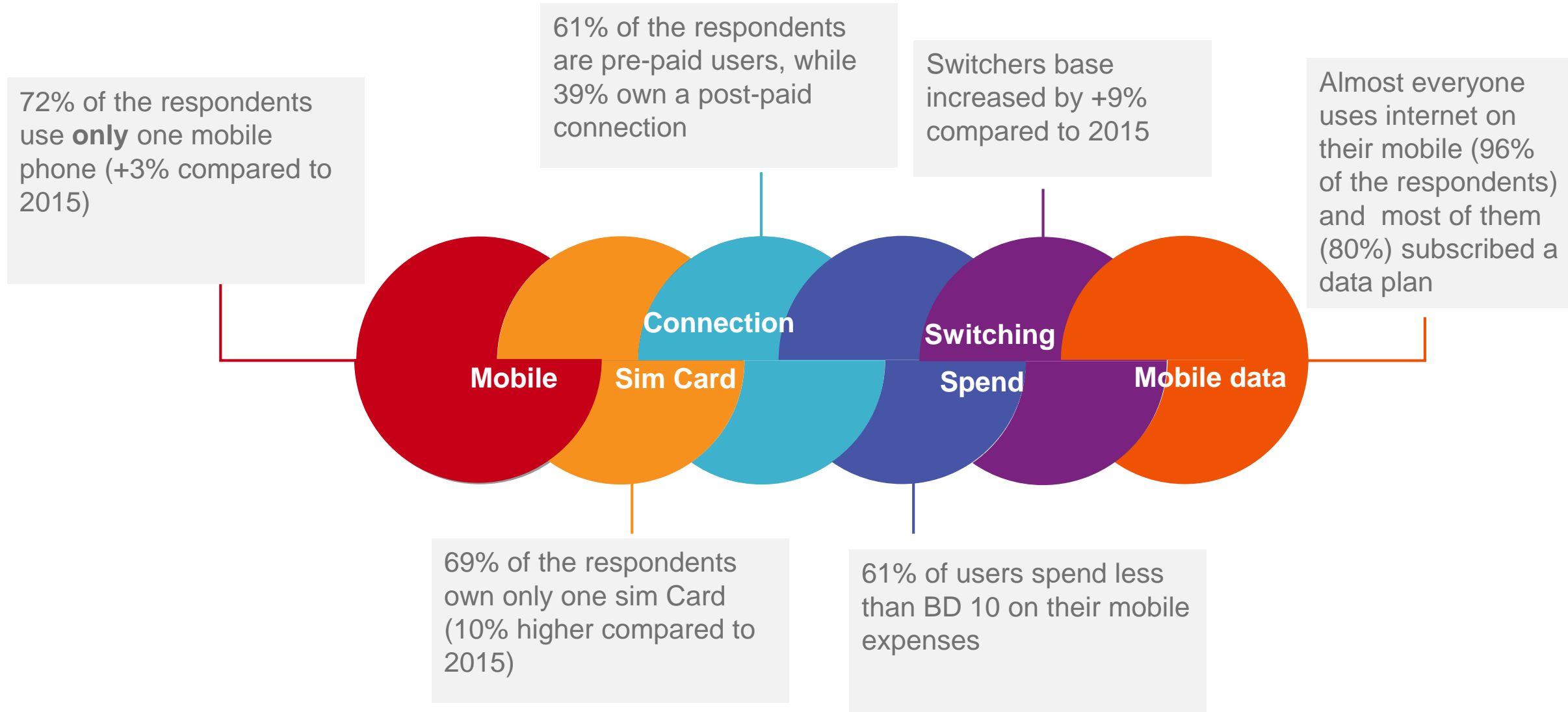
## 3.3

### Mobile and OTT Service

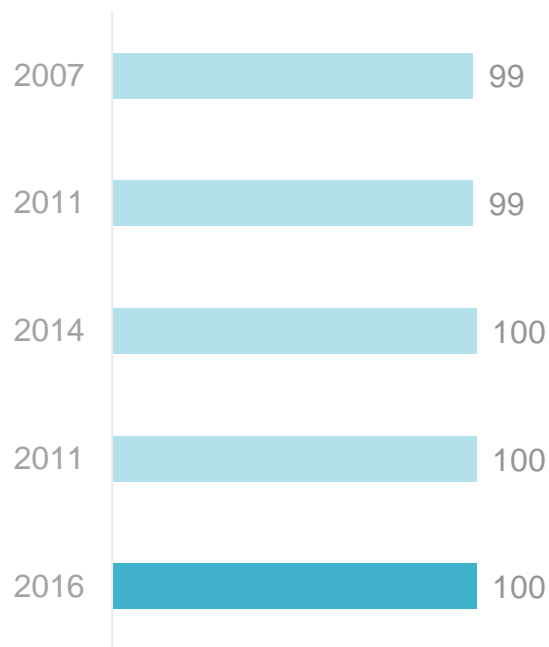


# Key Findings – Mobile Service

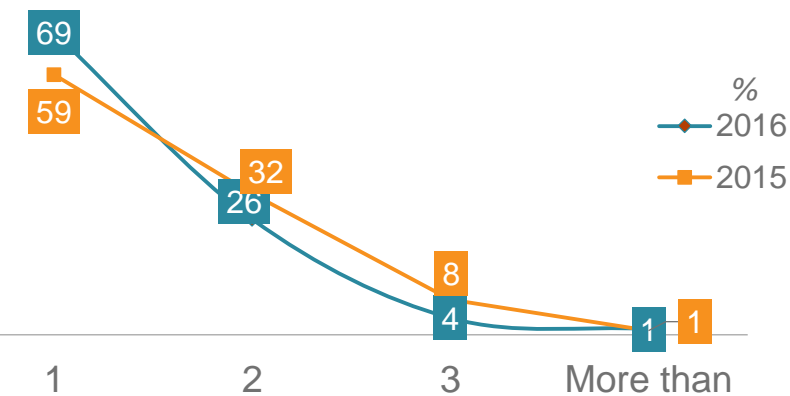
Mobile



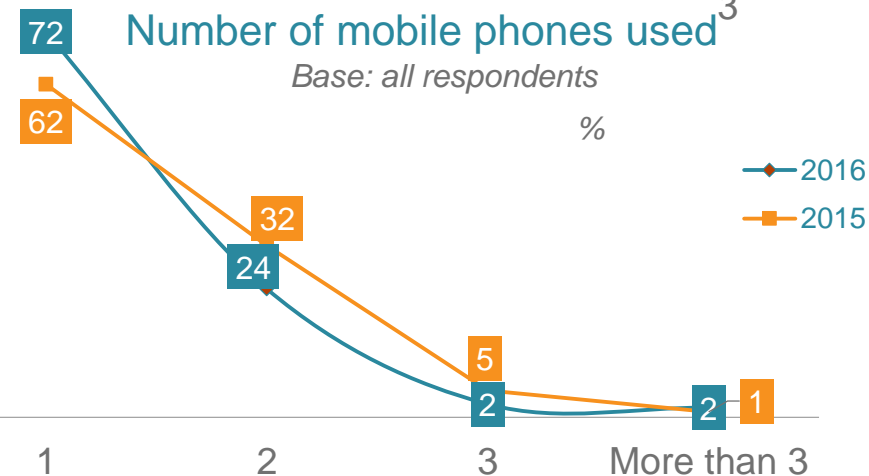
72% of respondents declared to have used one mobile phone while 69% own only one sim Card (+10% compared to 2015).



Number of SIM cards  
Base: all respondents

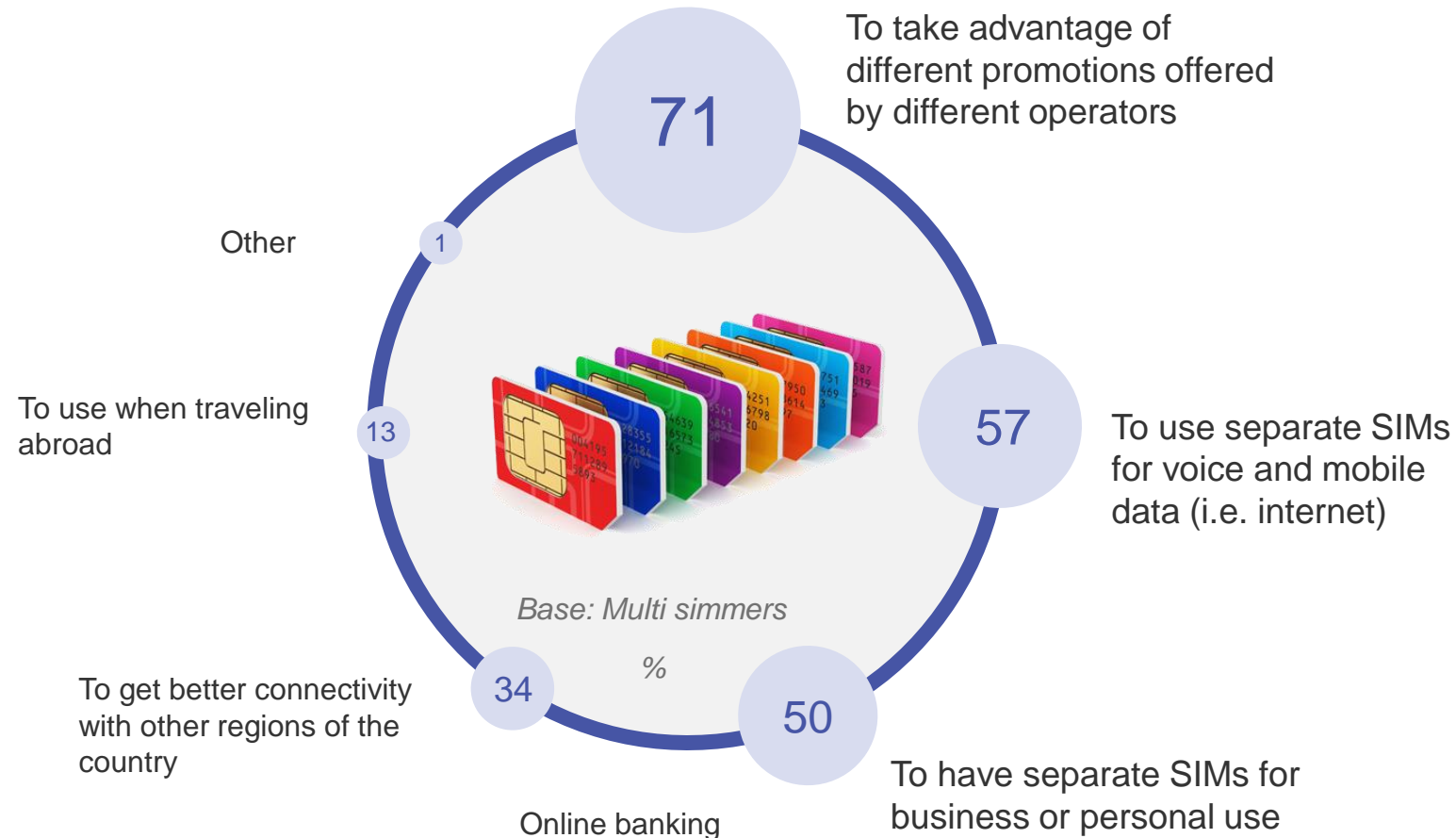


Number of mobile phones used  
Base: all respondents



Q. How many **Mobiles i.e. how many handsets** have you used for your own needs in the last 3 months?  
Q. How many **Active SIM cards** do you use for your own needs?

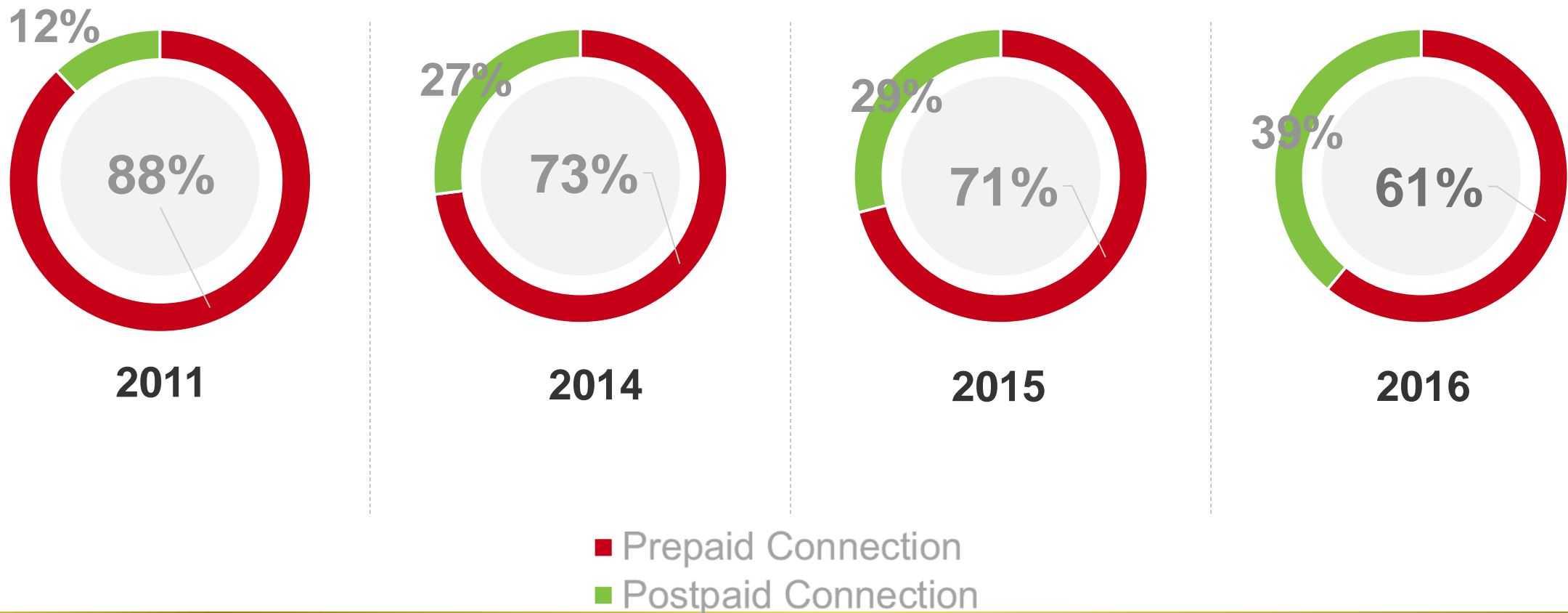
Among multi Simmers, the advantage of promotions made by different providers is the main reason to get multi Sim Cards



Q. You mentioned that you use more than one active SIM card for your needs; could you please tell us the reasons why do you use more than one SIM Cards?

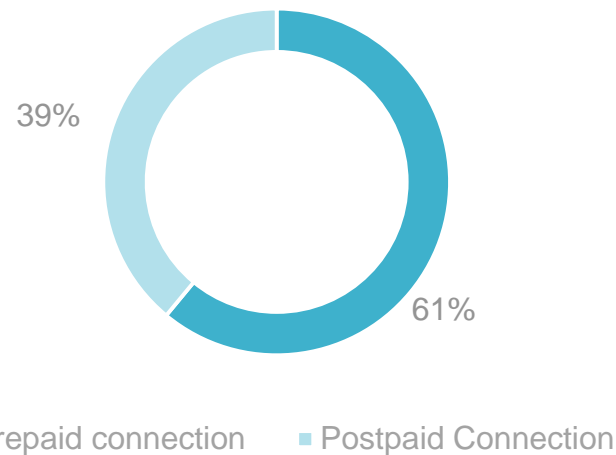


The trend for Prepaid connection continue to decline even in 2016; 61% of the respondents are prepaid users, while 39% own a postpaid connection.



Expenditure control and avoid monthly payments/commitments are the main reasons to use a prepaid connection. On the other side, avoid often recharge or getting a good offer subscription are the key reasons for postpaid usage.

### Mobile Phone Connection Type



### Reasons for using prepaid

%

Base: those who only have a prepaid connection

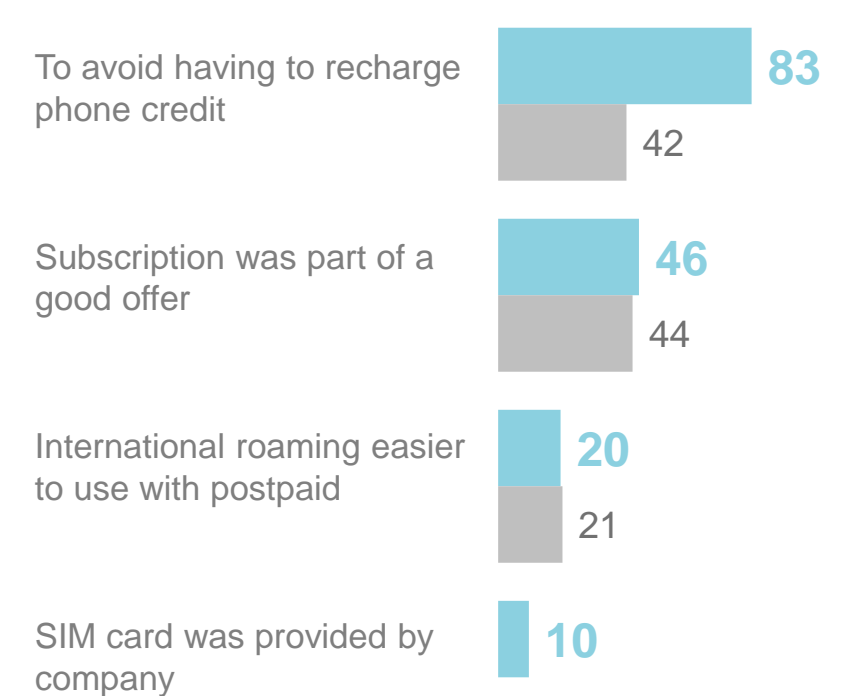


■ 2016 ■ 2015

### Reasons for using postpaid

%

Base: those who only have a postpaid connection



■ 2016 ■ 2015

Weekly average calls made from mobile reach out mainly to other mobile phone, followed by International calls and Fixed line

Average  
number of  
calls made  
each week to..

*Base:  
those  
who have  
used a  
mobile*



Fixed line

9



Mobile

26



International

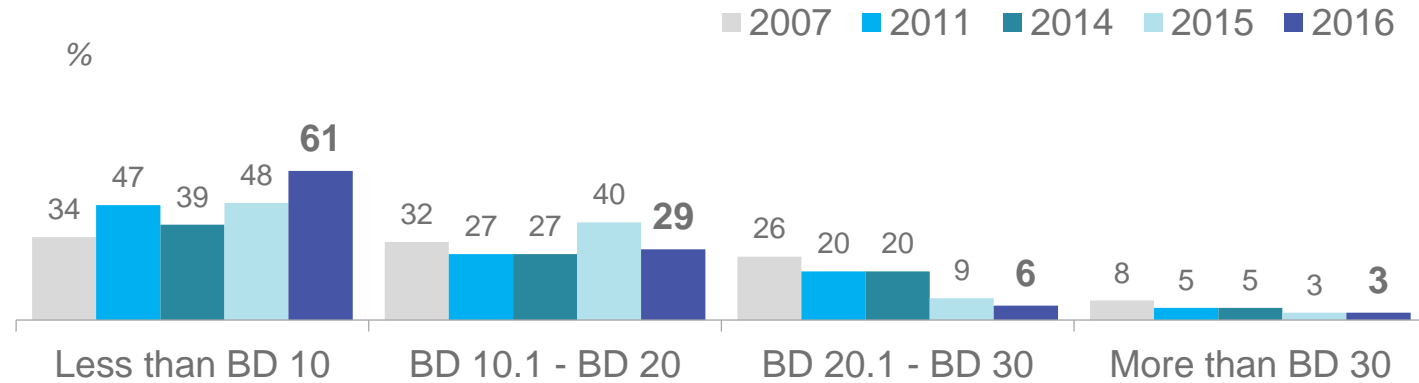
11

Q. On an average, how many calls do you make each week (include both weekday/ weekend of 7 days) from your mobile phone?

Majority of users spend less than BD 10 on their mobile expenses, significant increment compared to 2015.

## Monthly spend on mobile

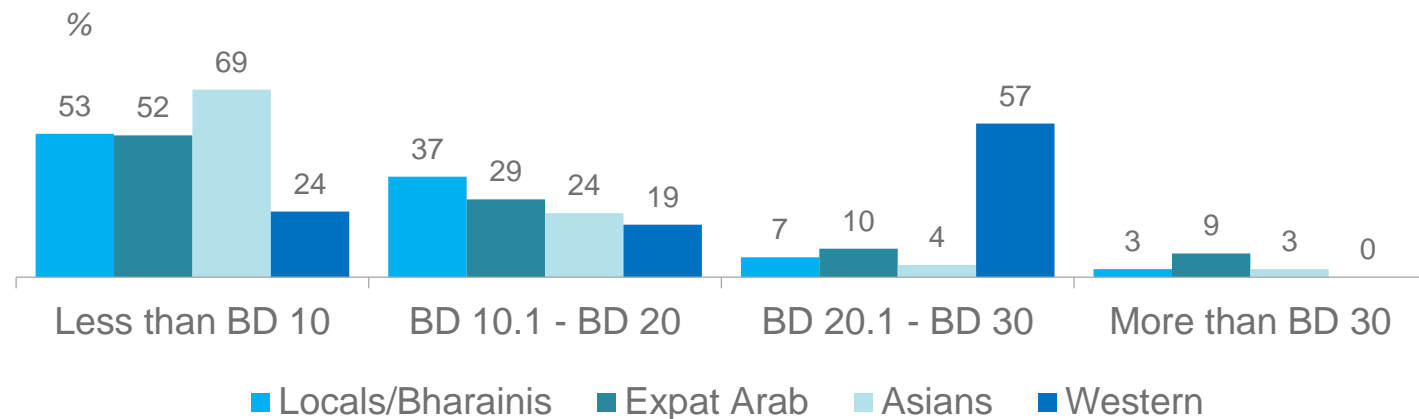
Base: those who have used a mobile



TREND

## Monthly spend on mobile by Nationalities

Base: those who have used a mobile



2016

Q. On average, how much do you spend on mobile phone service (including international calls and mobile data) each month?

Almost everyone uses internet on their mobile and 80% of those who have used internet on mobile, subscribed to a data plan.



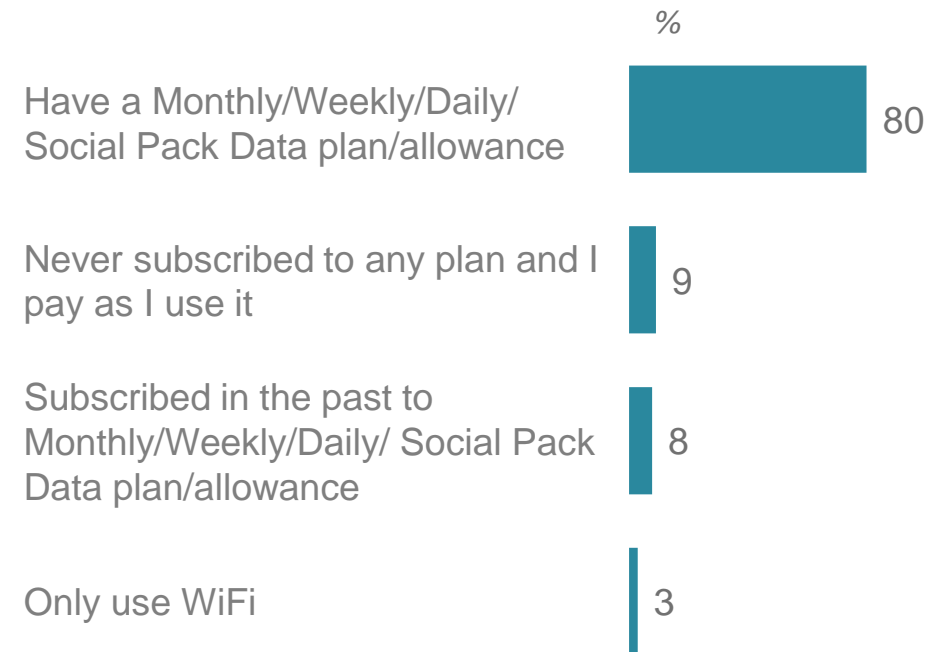
## 96% use internet on their phones

Base: all respondents



### Mobile data subscription

Base: those who have used internet on their mobile



Those who do not use mobile data either find it expensive or access internet only through WiFi. Vs. 2015, higher proportion using social network or accessing entertainment related content.

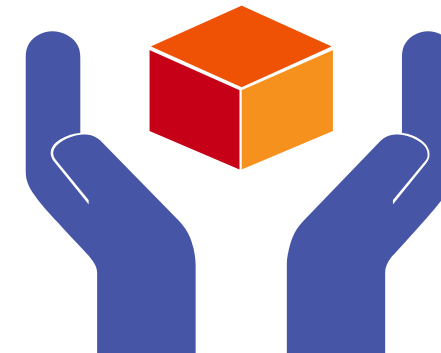
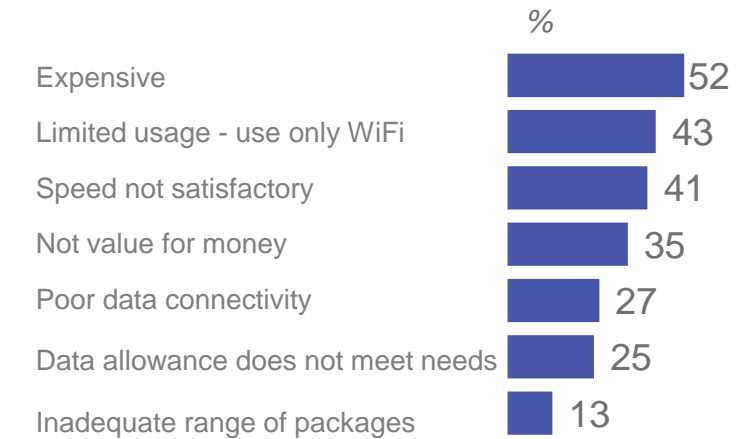
### Activities carried out on internet from mobile

Base: all respondents



### Reasons for not using mobile data

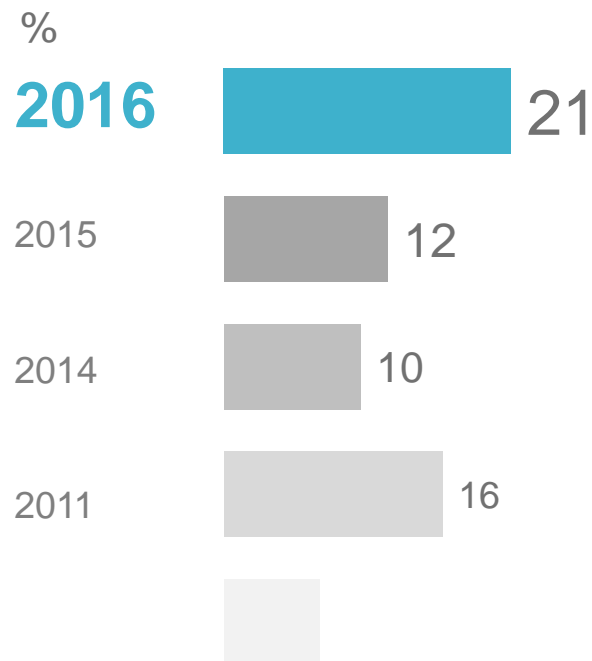
Base: Those who do not use mobile data



Switchers base increased in 2016 vs. previous years; The main reason to switch is due to get more attractive promotion and a good price from other providers.

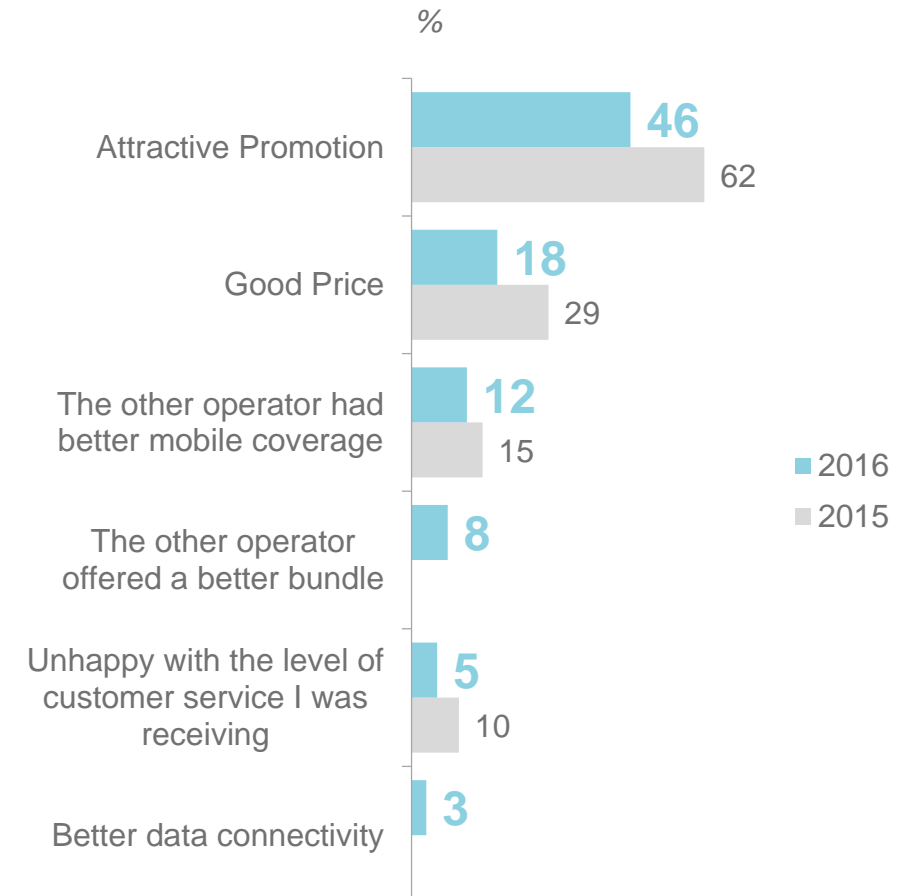
### Switched mobile providers

Base: those who have a mobile



### Reasons for switching providers

Base: those who have switched mobile provider

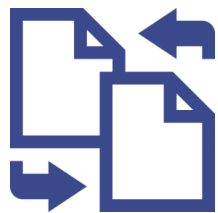


Almost 4 in 5 mobile users are aware of the number portability feature. Around one-third among those who have switched providers have done so without changing their number. They are also satisfied with their experience.



77% are aware that they can switch between mobile providers without changing the number

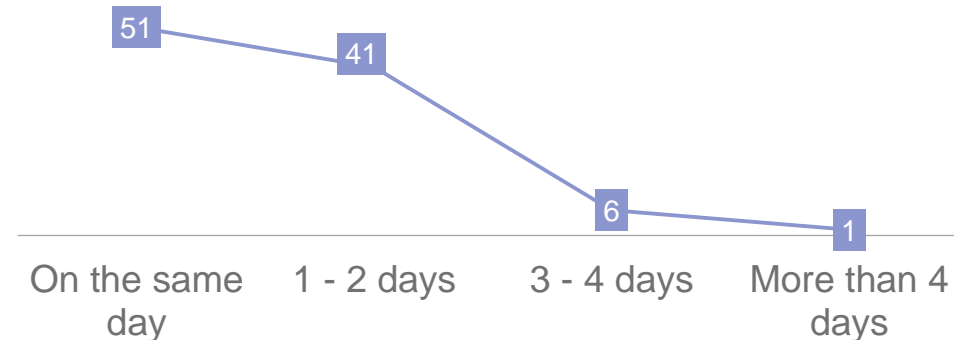
Base: all respondents



30% of those who have switched providers in the past have done so without changing the number

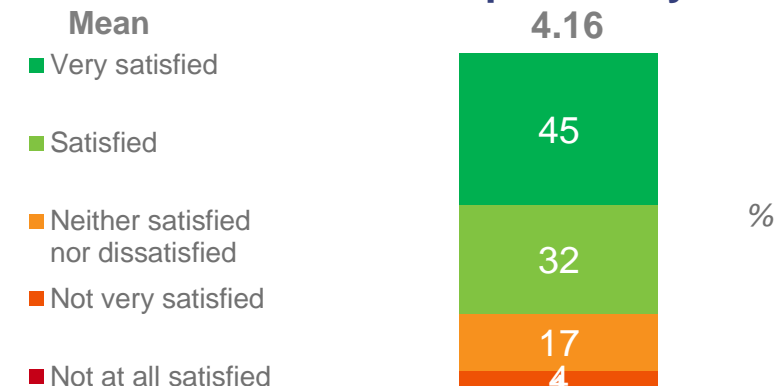
Base: those who have switched mobile provider in the past

### Time taken to activate new SIM %



Base: those who have switched mobile provider using number portability

### Satisfaction with number portability

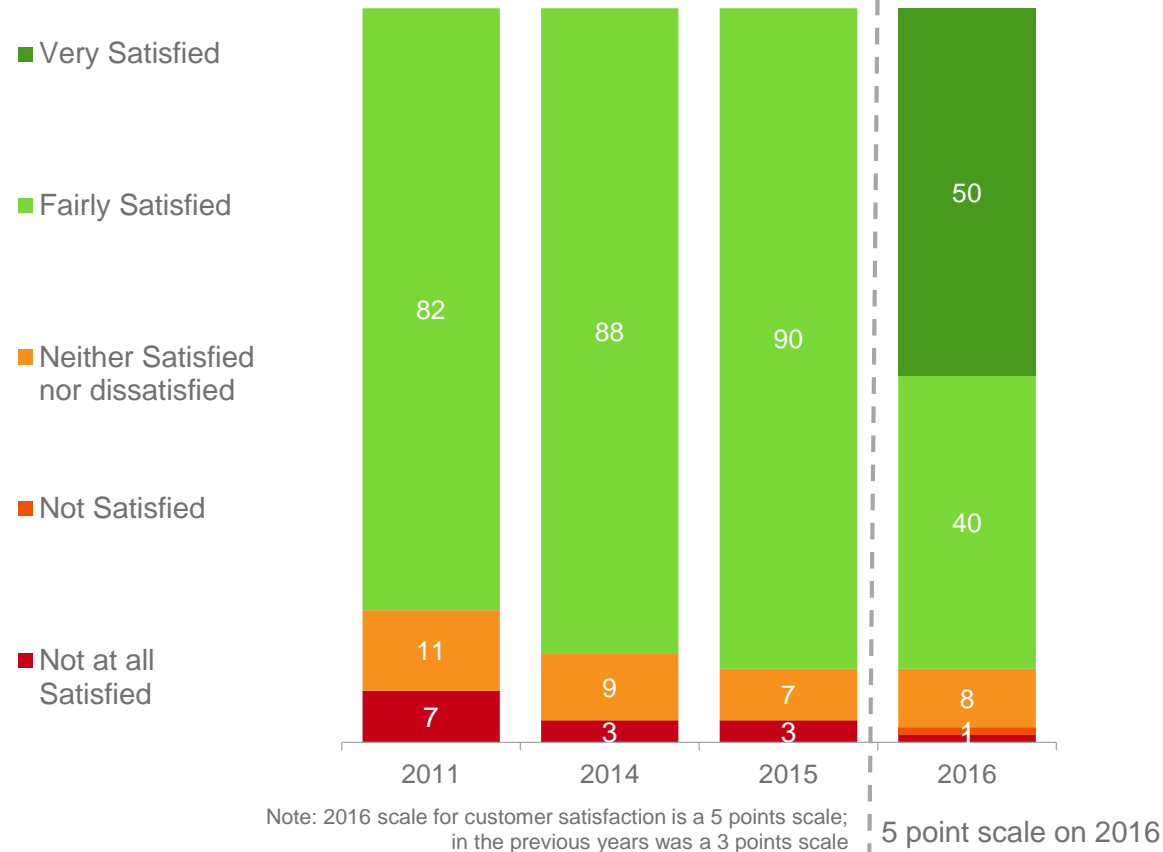


Base: those who have switched mobile provider using number portability

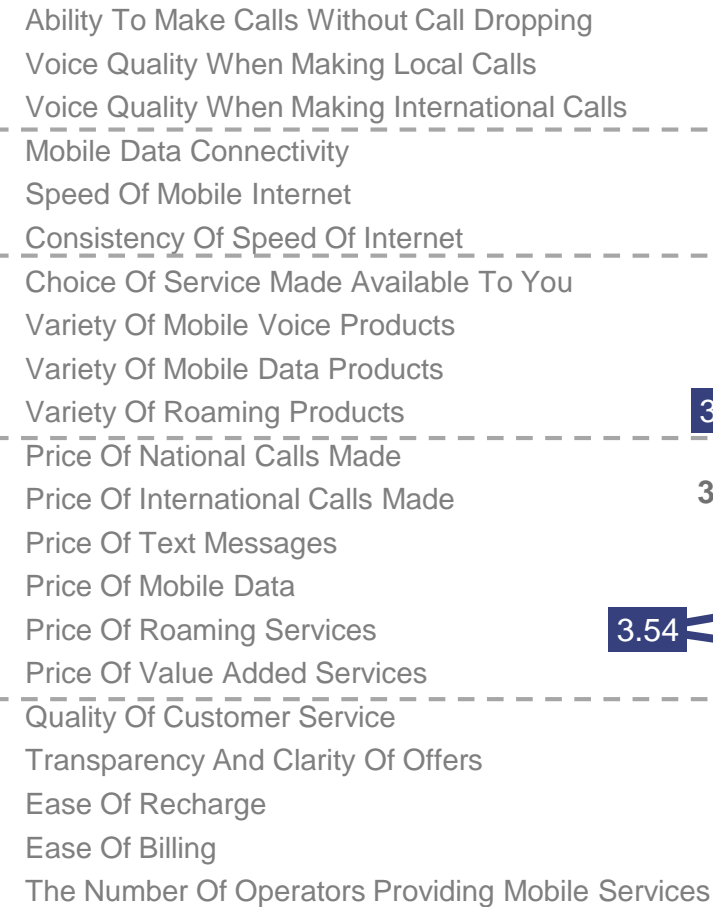


Customers are satisfied with the mobile services in general (Top 2 Box score of 90, same score as 2015). Pricing in general seeing relatively lower satisfaction score.

## Mobile Overall Satisfaction through the years %

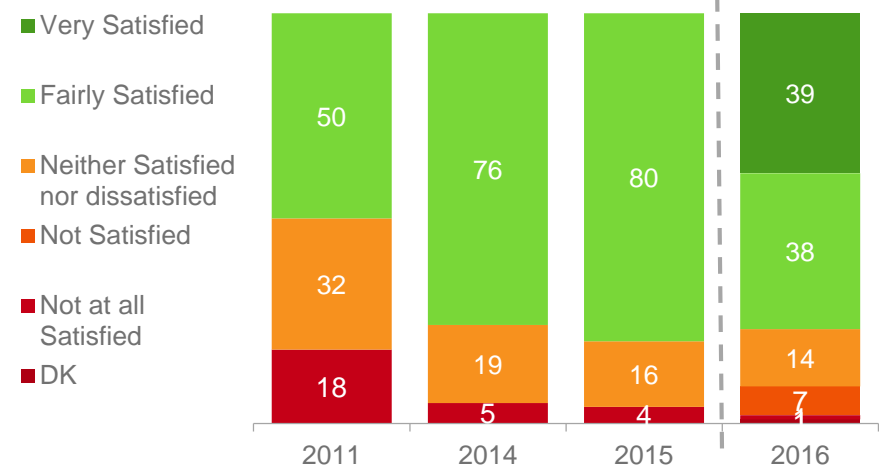


### Overall Mobile Service

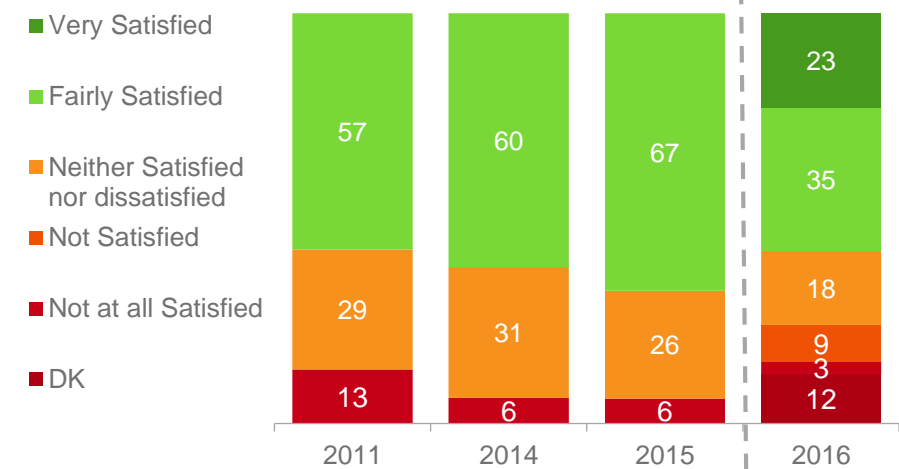


Q. How satisfied are you with the following elements of your mobile services?

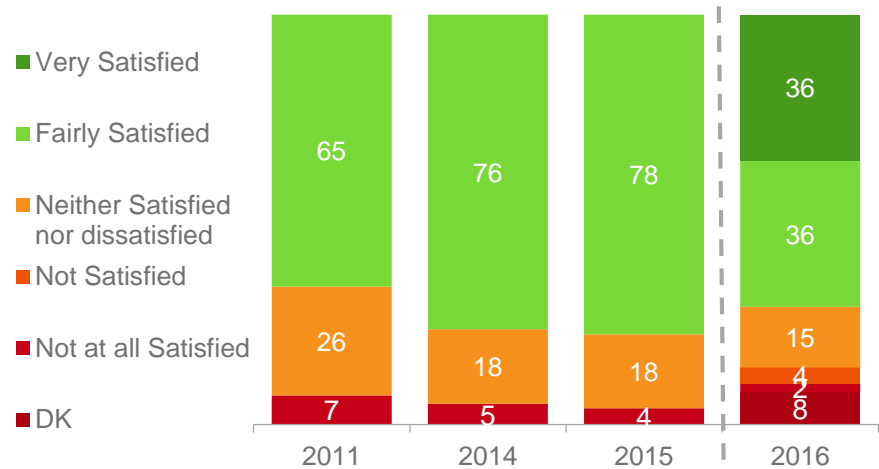
Price of National calls



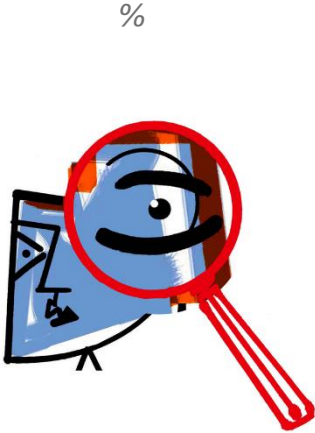
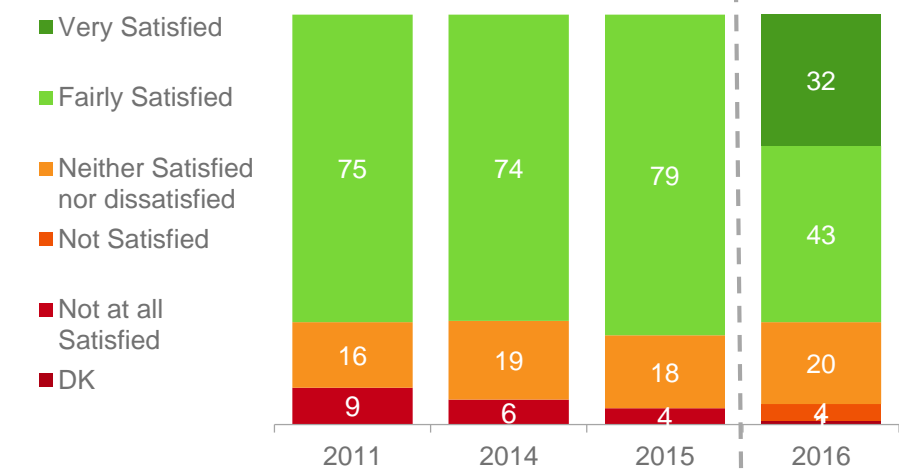
Price of Text messages



Quality of Customer Service

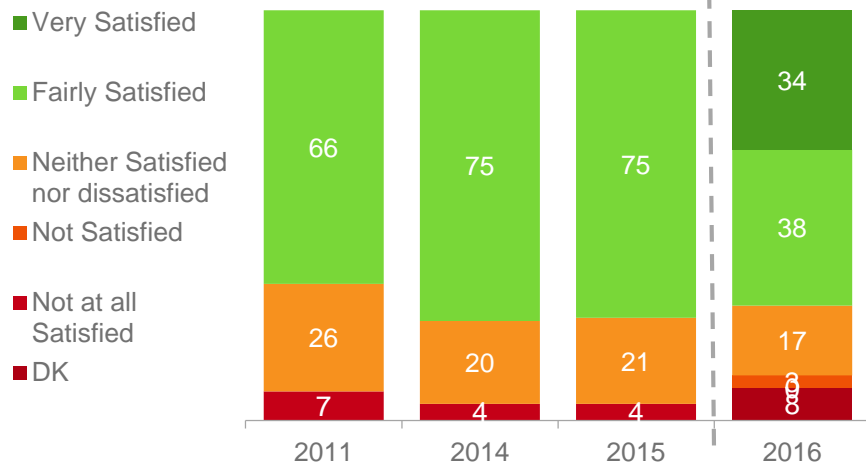


Ability to make call w/o being cut off

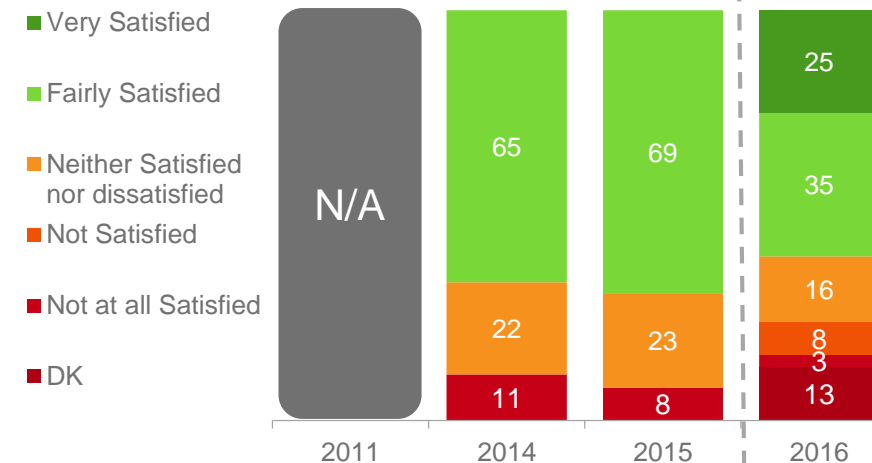


Q. How satisfied are you with the following elements of your mobile services?

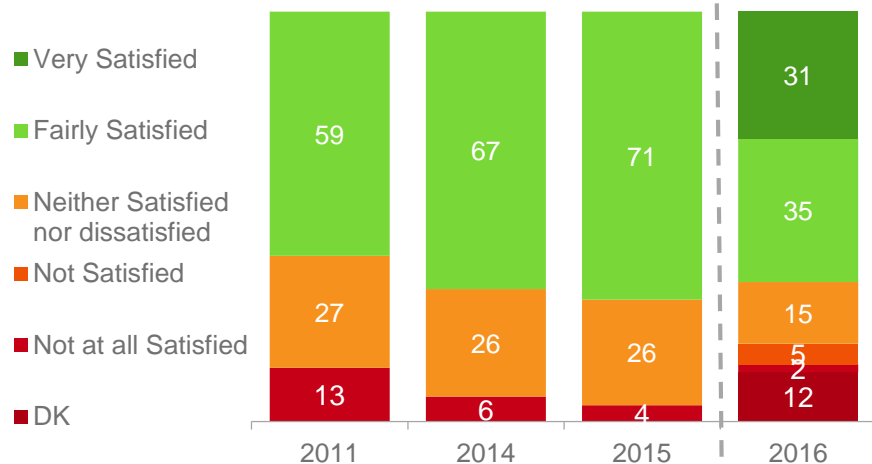
### Choice Of Service Made Available To You



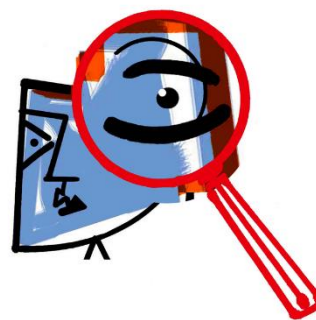
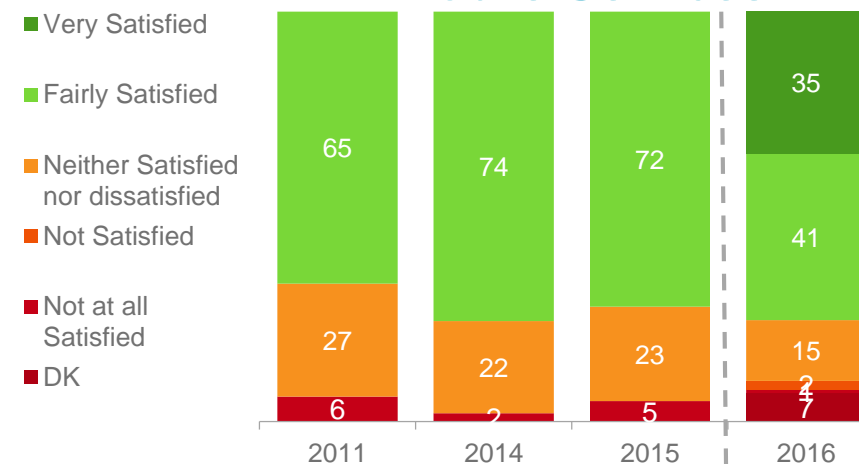
### Price Of International Calls Made



### Price Of Value Added Services



### Number Of Operators Providing Mobile Services

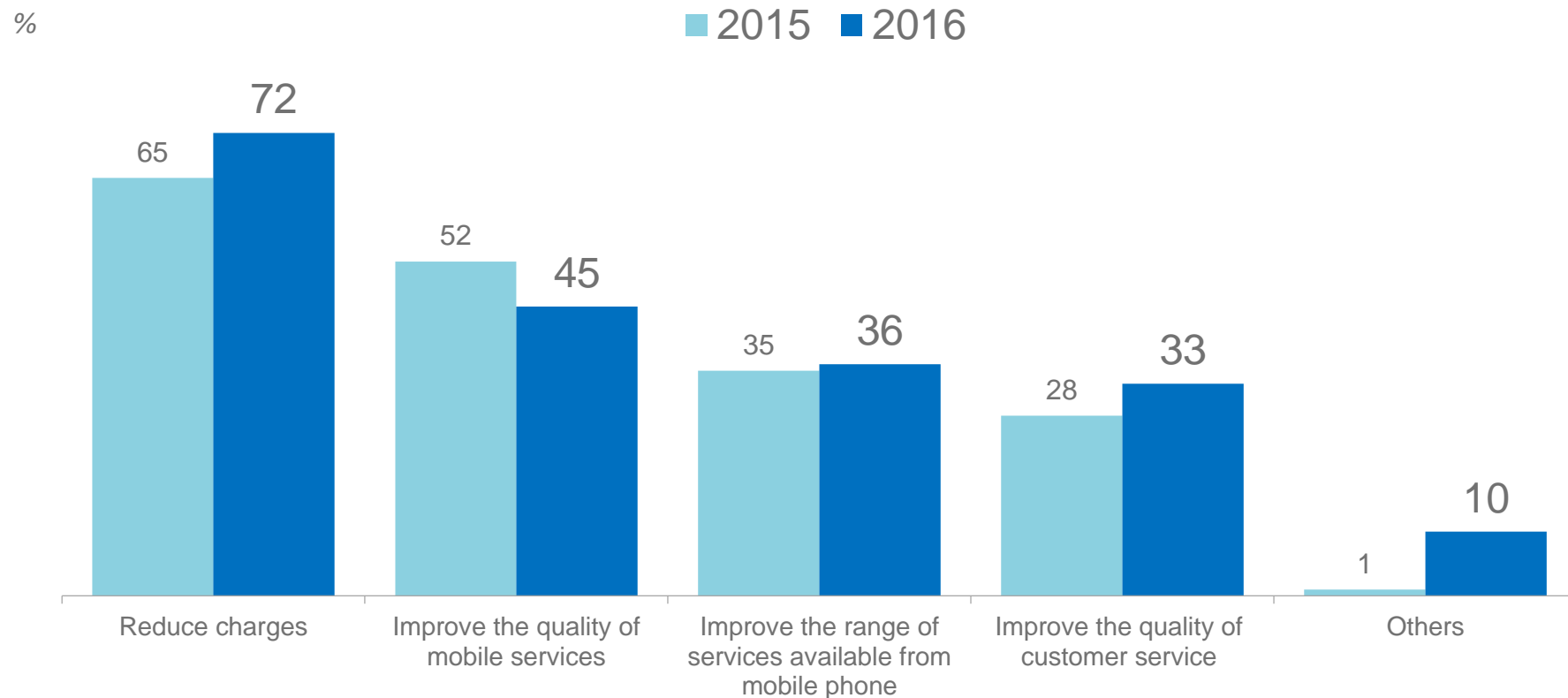


Q. How satisfied are you with the following elements of your mobile services?

Reduction of charges is the key suggestion to improve the service, +7% compared to 2015.

## Suggestions for improvement

Base: those who have a fixed line



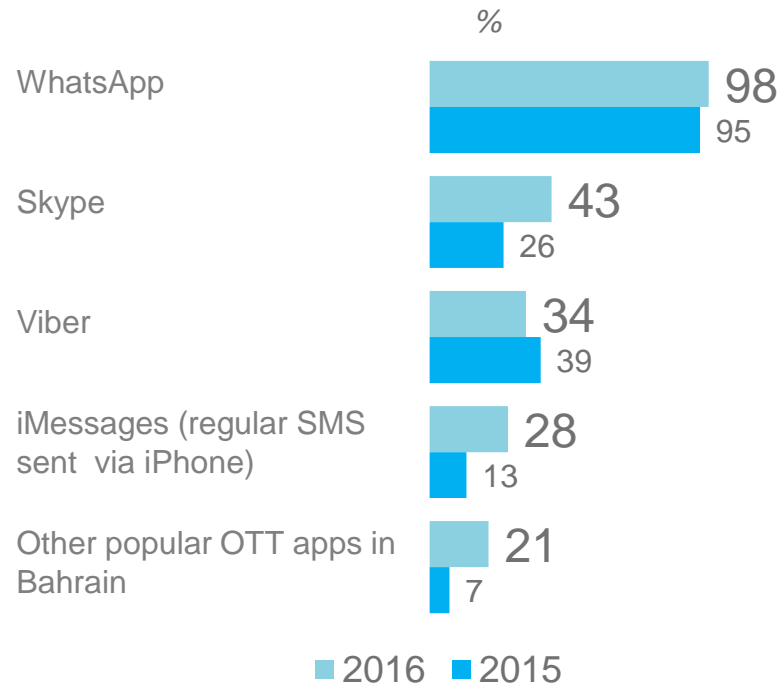
Q. Could you please tell me if there are any suggestions you would like to make to help serve you better in the future for fixed line?

When messaging, respondents favour OTT, wherein WhatsApp is used by nearly everyone. Among OTT users, only 13% also use SMS, +6% compared to 2015



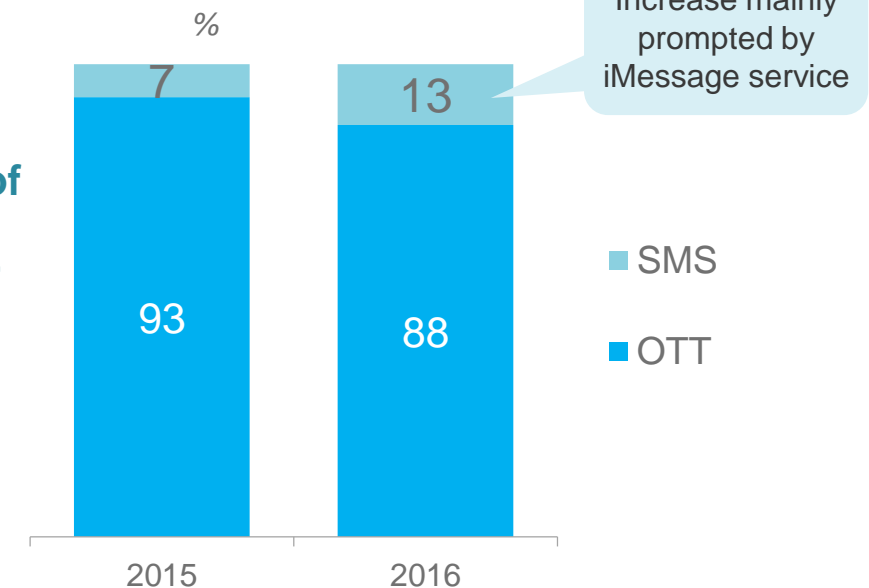
### OTT apps used

Base: those who have used internet on mobile



### Proportion of messaging SMS vs OTT

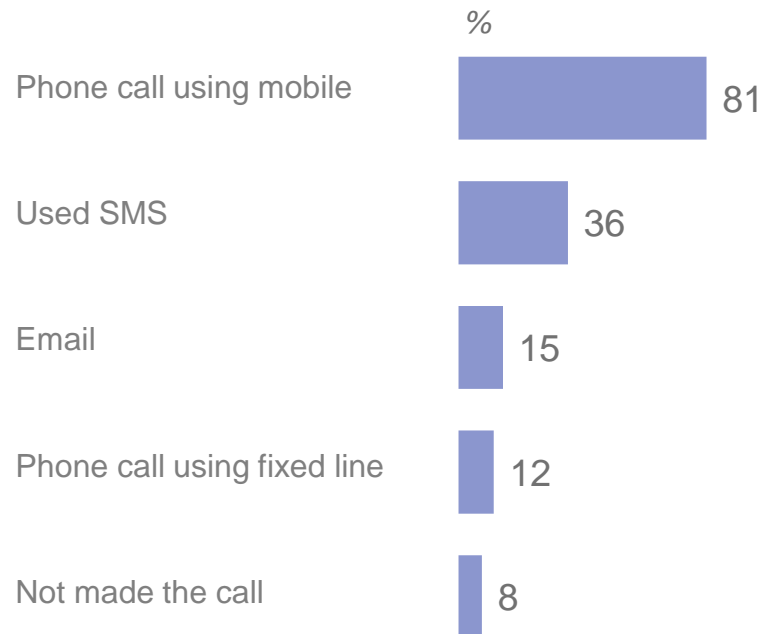
Base: those who have used OTT apps



In case of unavailability of OTT, calling using mobile is the preferred means of communication.

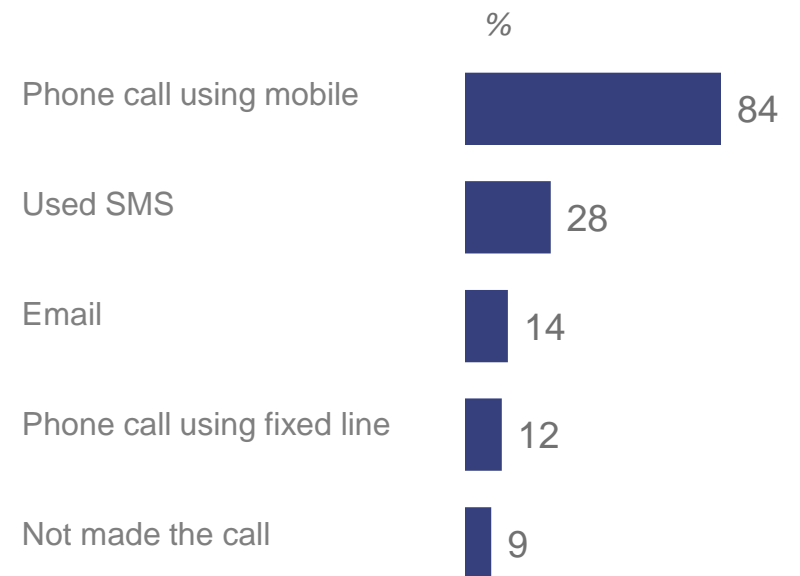
**What if  
Instant  
Messenger  
was not  
available**

*Base: those  
who have  
used OTT  
apps*



**What if OTT  
calling was  
not available**

*Base: those  
who have  
used OTT  
apps*



In terms of OTT satisfaction, Network coverage represent a critical point among OTT users

### Satisfaction with OTT apps

*Base: those  
who have  
used OTT  
apps*

Mean score: Scale 1 (Not at all Satisfied) to 5 (Very Satisfied)

Quality of voice calls

3.98

Ability to make calls  
without call dropping

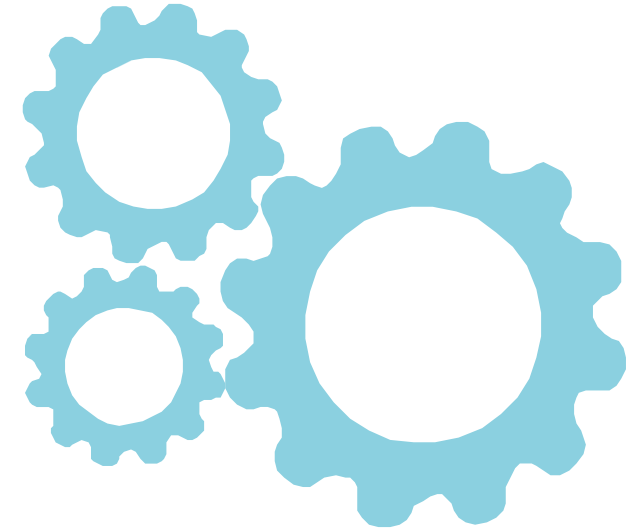
3.73

Speed of delivery of text  
messages

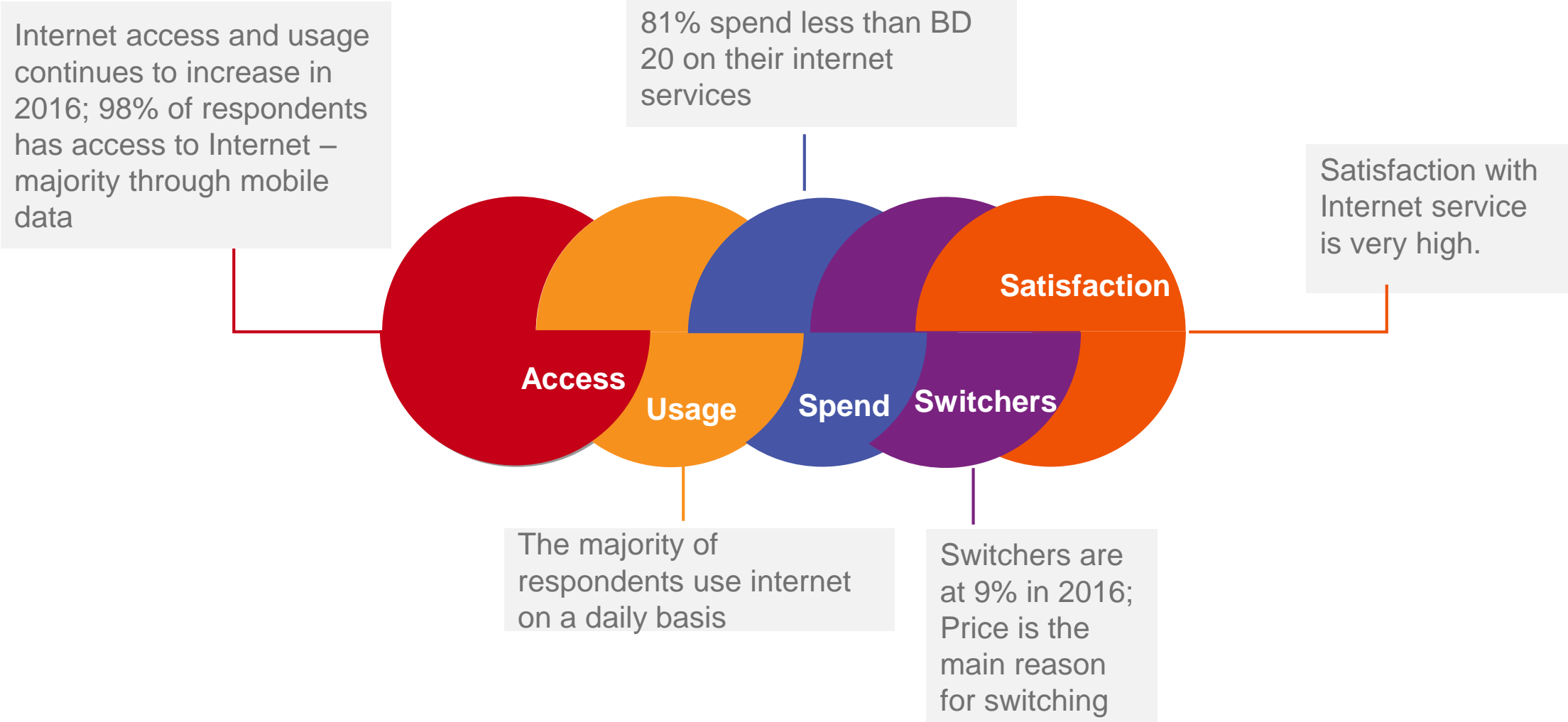
4.12

Consistency of network  
coverage – for calls and  
messages

3.87

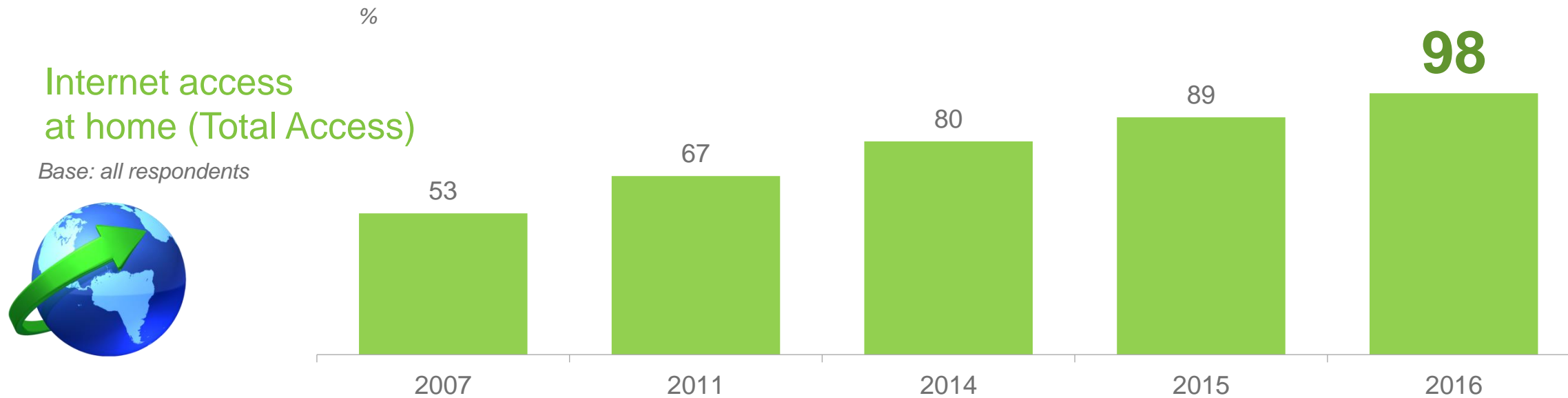


Q. How satisfied are you with the following elements of OTT communications?





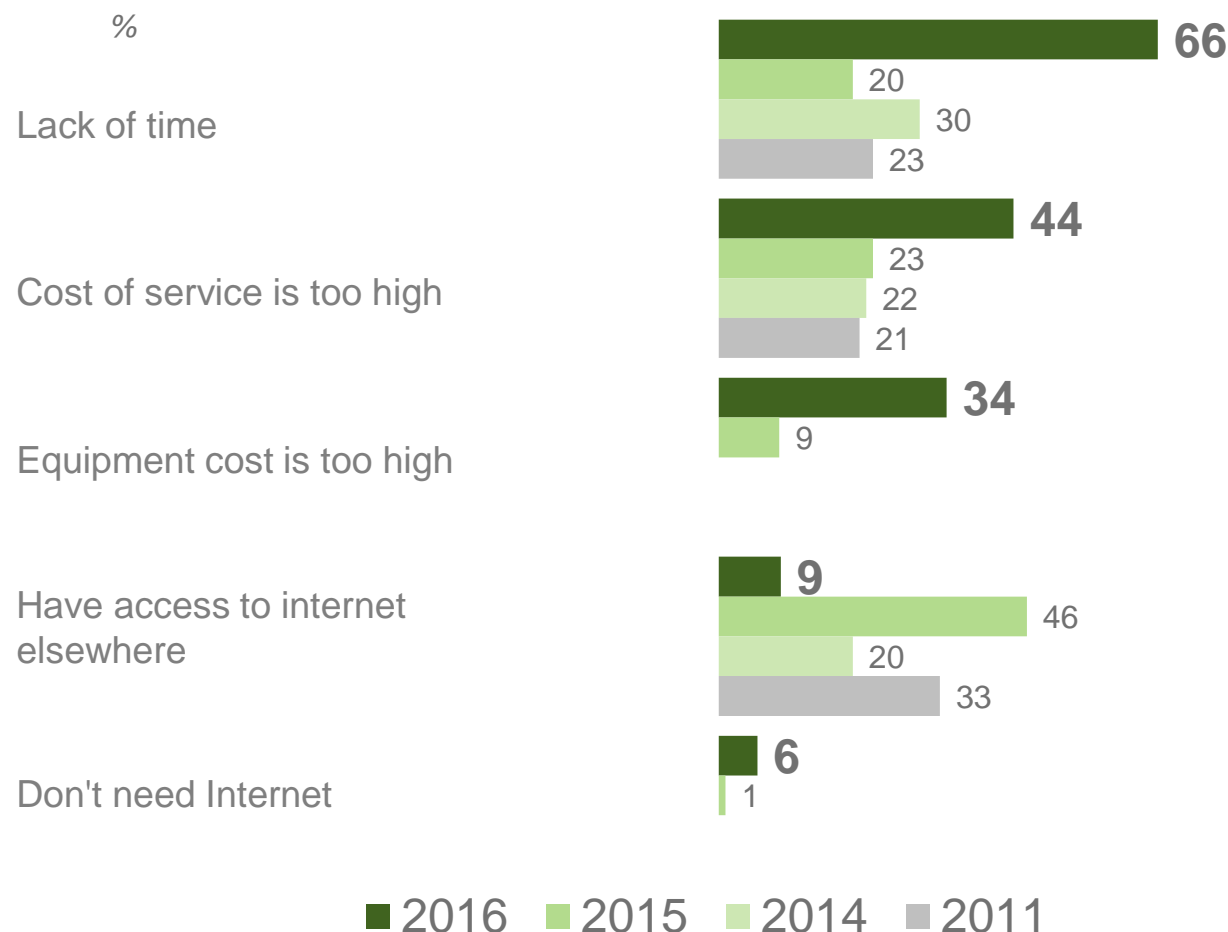
Internet access and usage continues to increase in 2016.



# Lack of time and the high cost of service are the main reasons for not having access to internet at home in 2016

## Reasons for not having access to internet at home

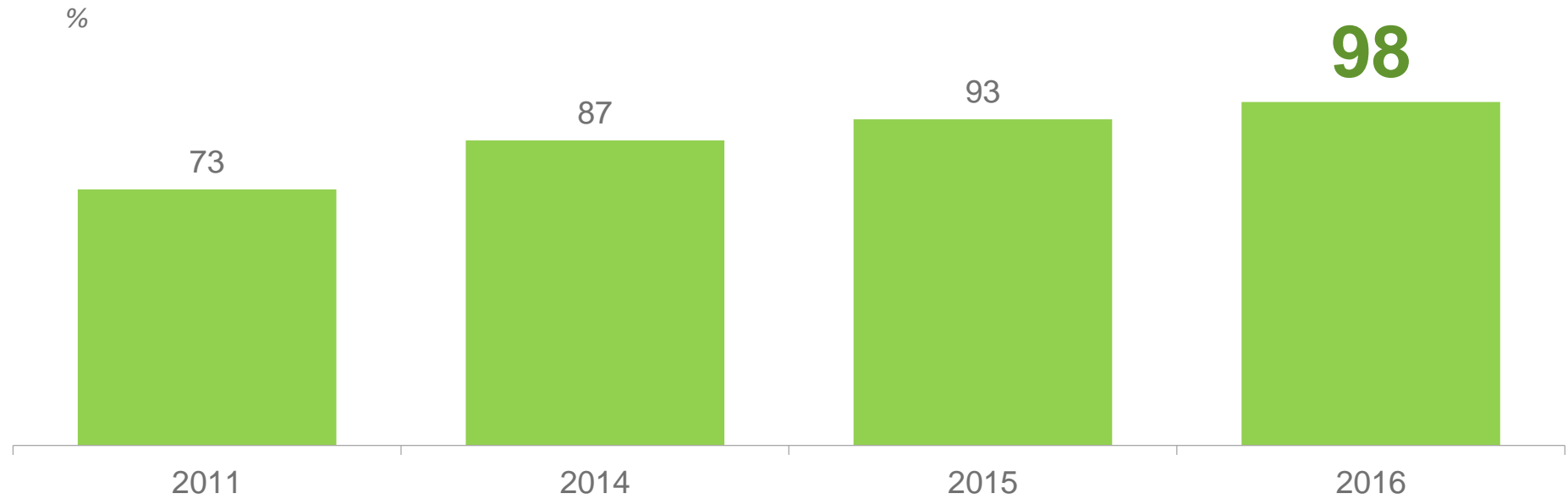
Base: those who don't have access to internet at home



Nearly everyone has access to internet as well as uses it now.

Used internet in  
the last 3 months

Base: all respondents



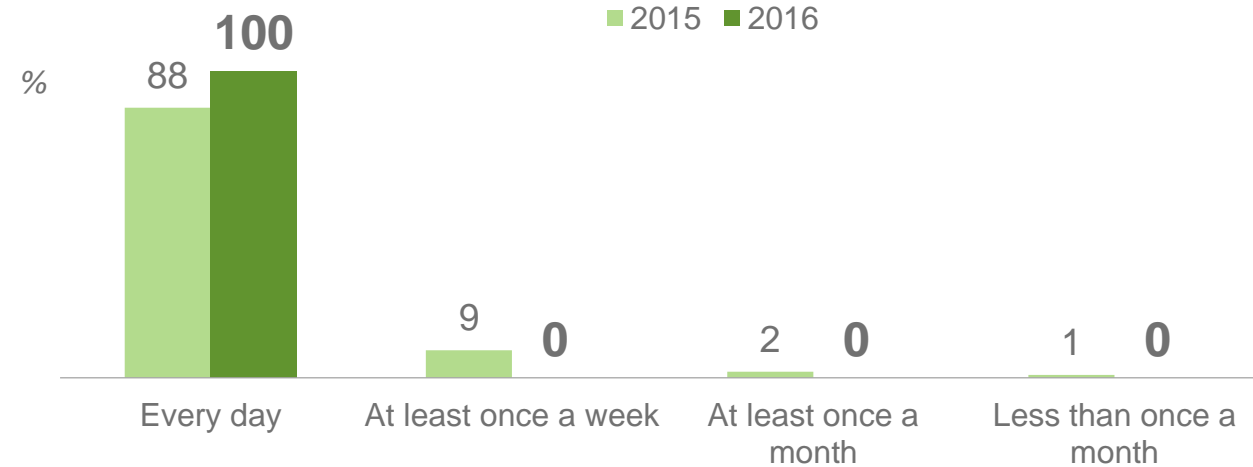
Q. Have you used internet from any location?

All respondents use internet on a daily basis and all of them have a mobile broadband network via handsets, which increased significantly compared to 2015.



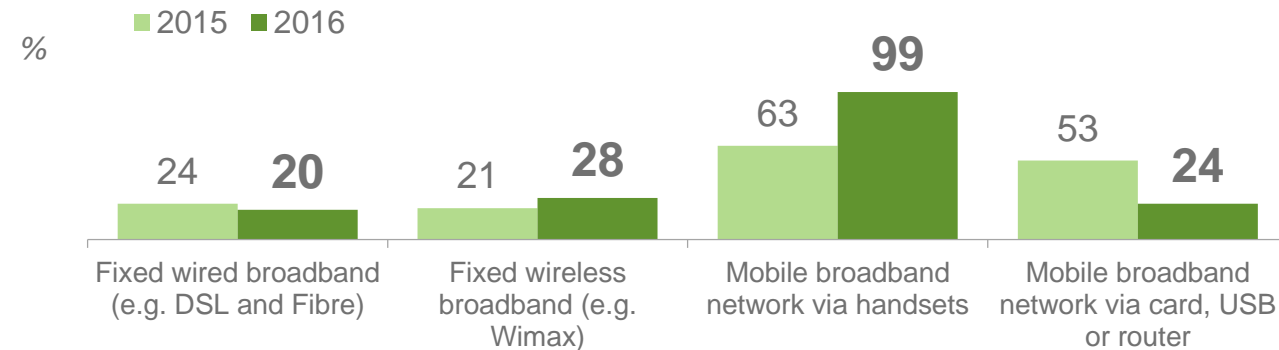
### Frequency of using internet

Base: those who have used internet



### Type of connection

Base: those who have used internet



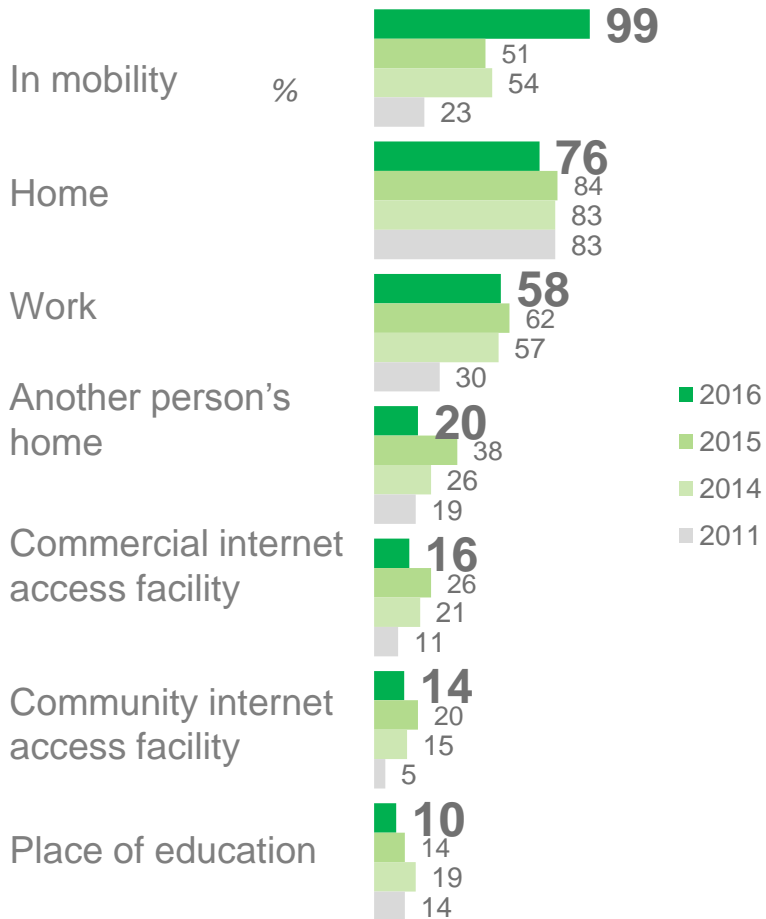
Q. On an average, how often did you use the internet in the last 3 months?

Q. What are all the types of internet access you or your family members used? Please let me know all the methods used to access internet at home

Internet usage location mostly in mobility, at home and at the work place. 40% of internet users utilize a fixed wired/ Fixed wireless with more than 10Mbps

### Location of internet usage

Base: those who have used internet



### Speed of connection

Base: those who have used corresponding type of connection

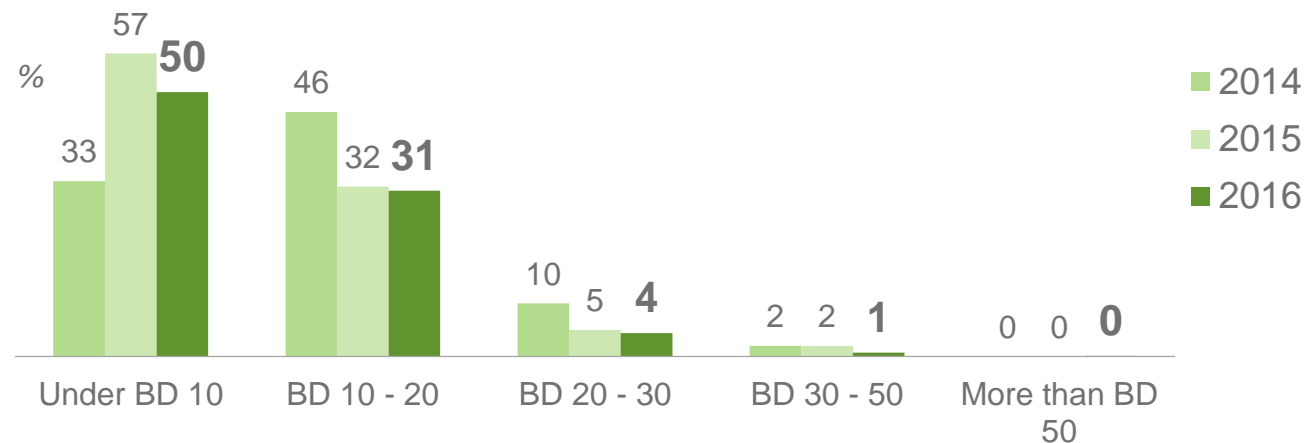
	2016	Fixed wired	Fixed wireless
1 Mbps or less		5	-
2Mbps to 5 2Mbps		21	32
6 Mbps to 10 Mbps		32	27
More than 10Mbps		42	40

81% spend less than BD 20 on their internet services and the majority are not willing to pay extra for a higher speed.



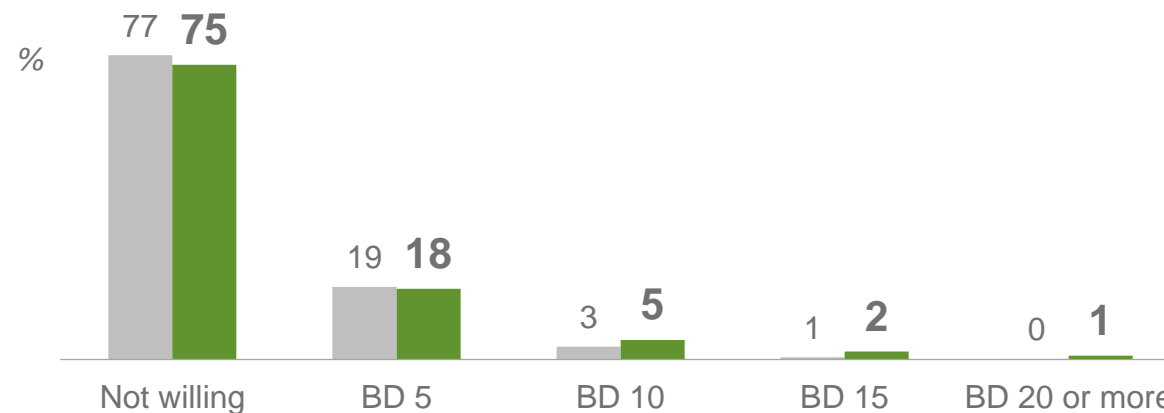
### Monthly spend on internet

Base: those who have used internet



### Willingness to spend extra for 100Mbps

Base: those who have used internet

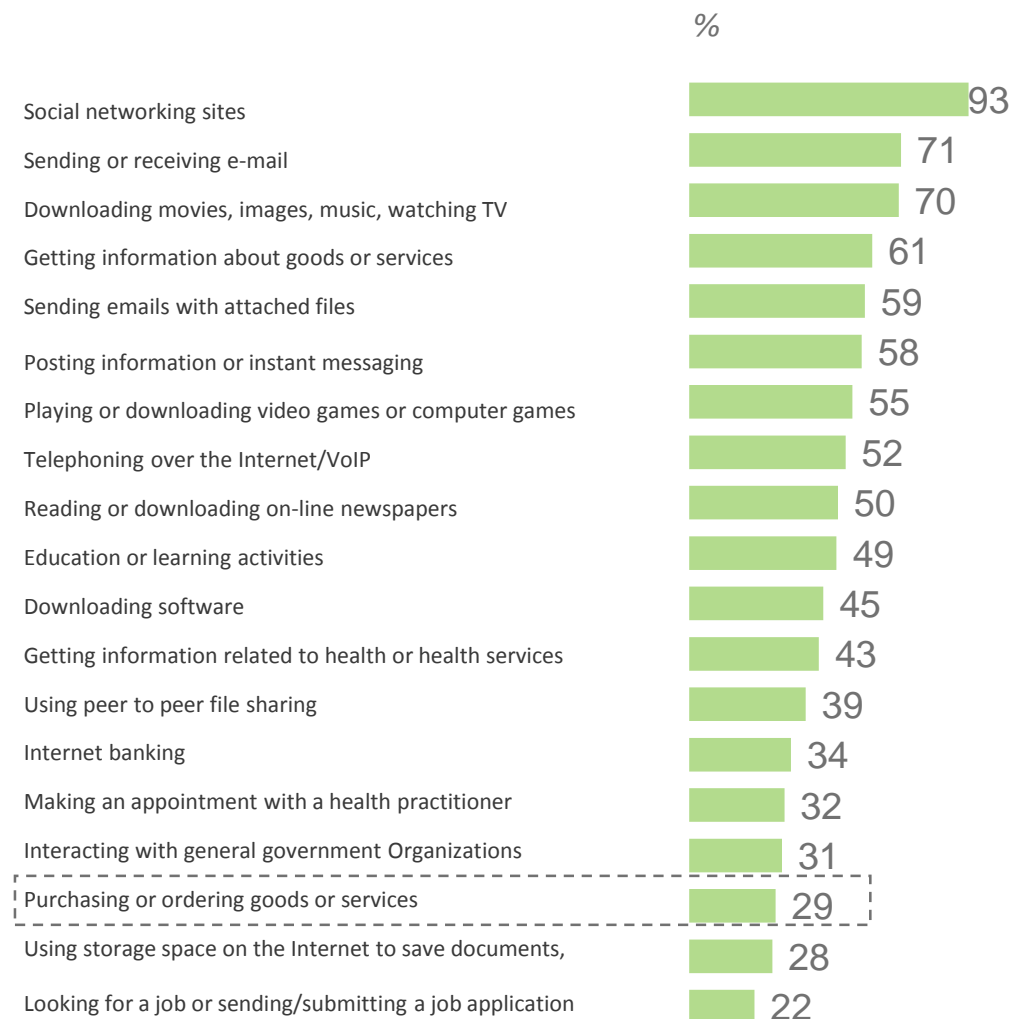


Among other activities – approximately 30% of the audience are shopping online, using cloud services and using internet banking services.

2016

## Activities carried out on internet

Base:  
those who  
have used  
internet



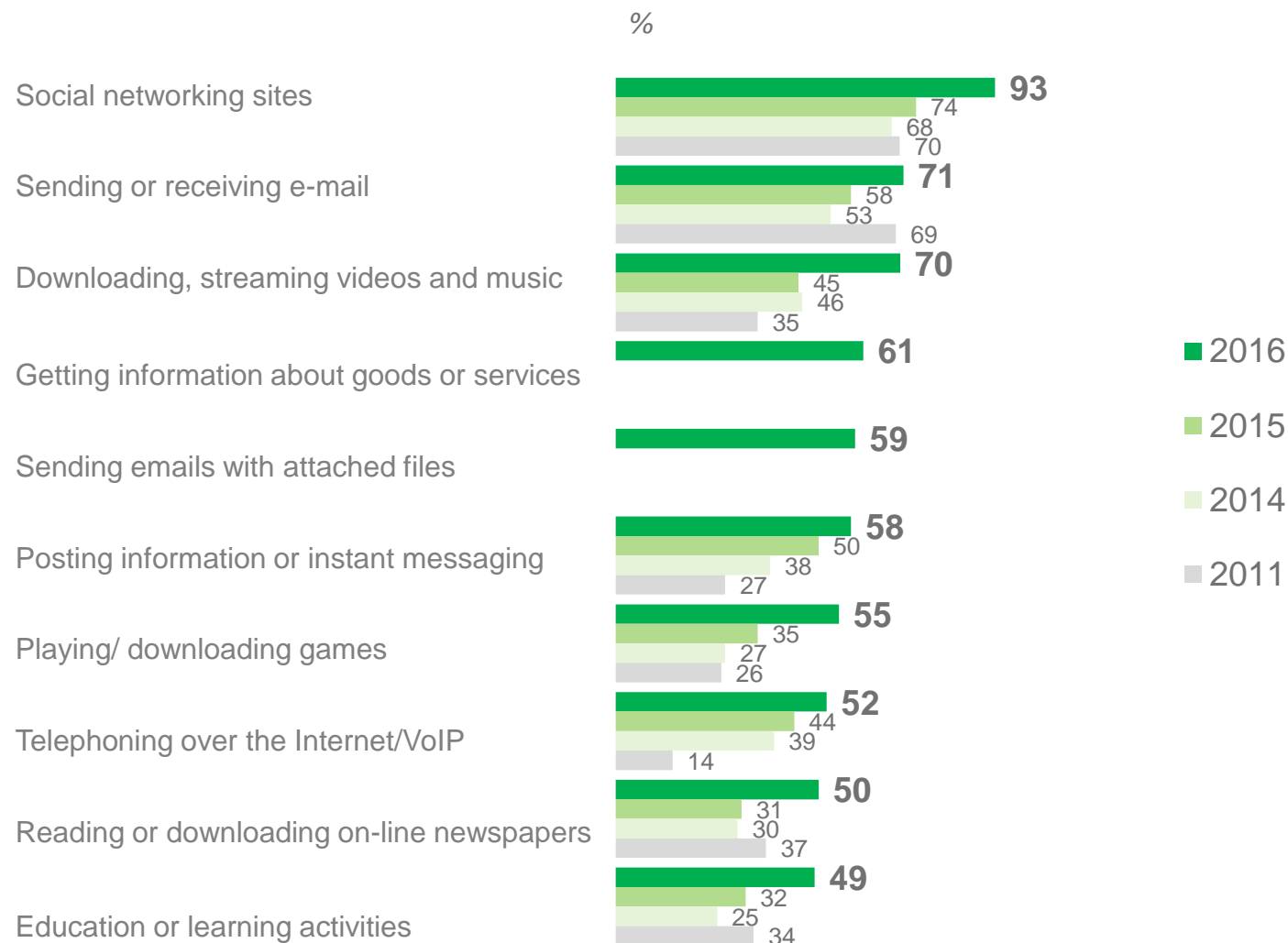
Q. For which of the following activities did you use the internet for private purposes (from any location) in the last three months?

Social networking, access to entertainment content, gaming etc registering an increase in 2016.

## TREND

### Activities carried out on internet

Base:  
those who  
have used  
internet



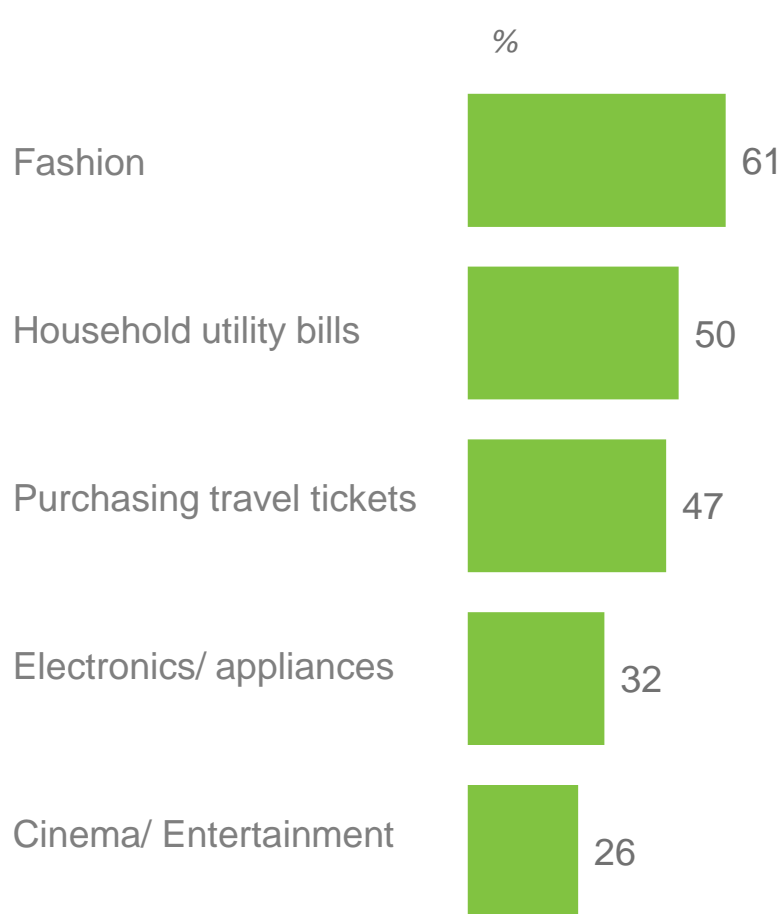
Q. For which of the following activities did you use the internet for private purposes (from any location) in the last three months?



Those shopping online – use it primarily to purchase fashion products followed by bill payments.

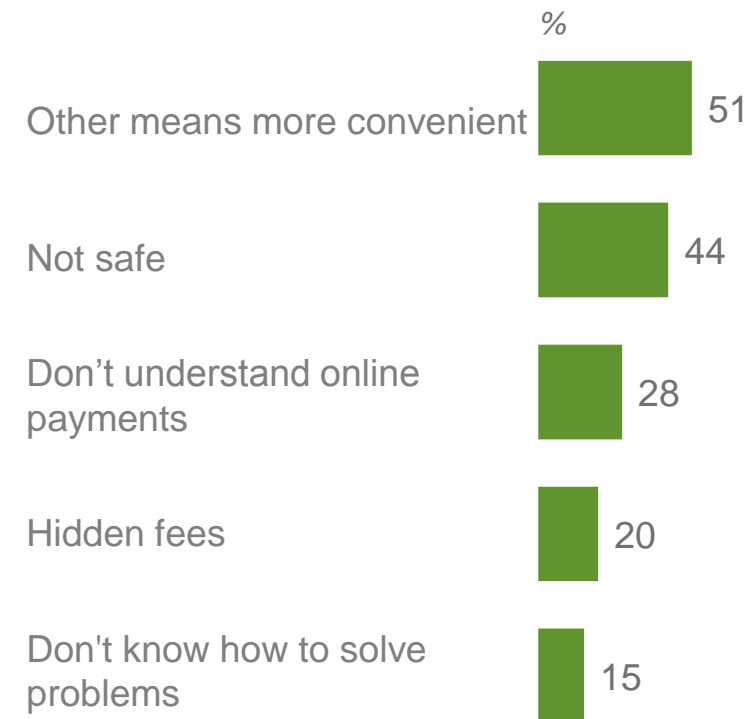
Types of goods purchased online

Base: those who have purchased online



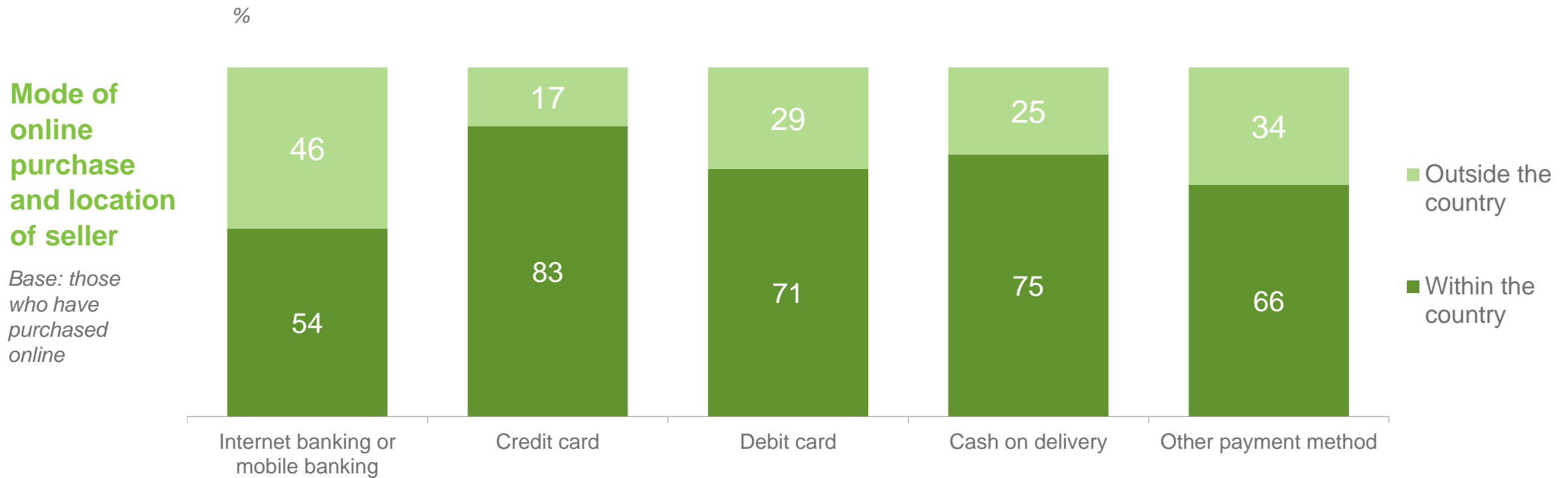
Barriers to online purchases

Base: those who have not purchased online



Q. You said that you made an online purchase in the last 3 months, could you please tell me what kind of products or services did you buy online?  
 Q. You said that you have not bought any products or service on the internet in the last 3 months, can you please tell me the reasons for that?

Within the country, Credit card and Cash on delivery are the main mode to pay after an online purchase; Outside the country, Internet/mobile banking is the most used method.



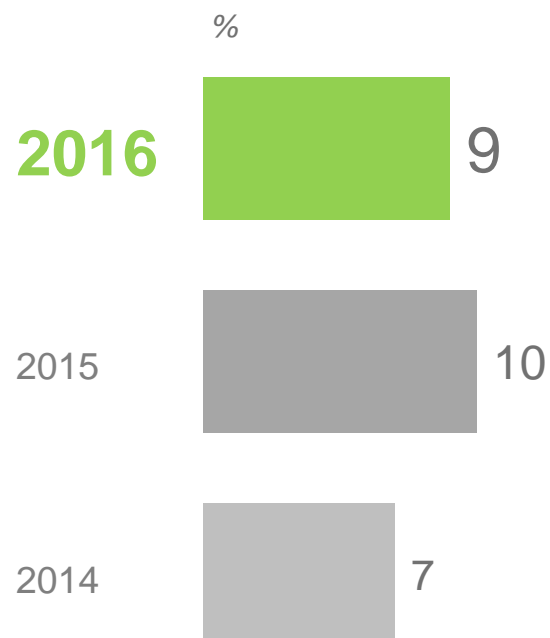
Q. How did you pay for the product or service you bought online from sellers within the country and outside?

Proportion of internet users switching their providers remains stable vs. 2015. Price is the main reason for switching.

## Internet – Switching

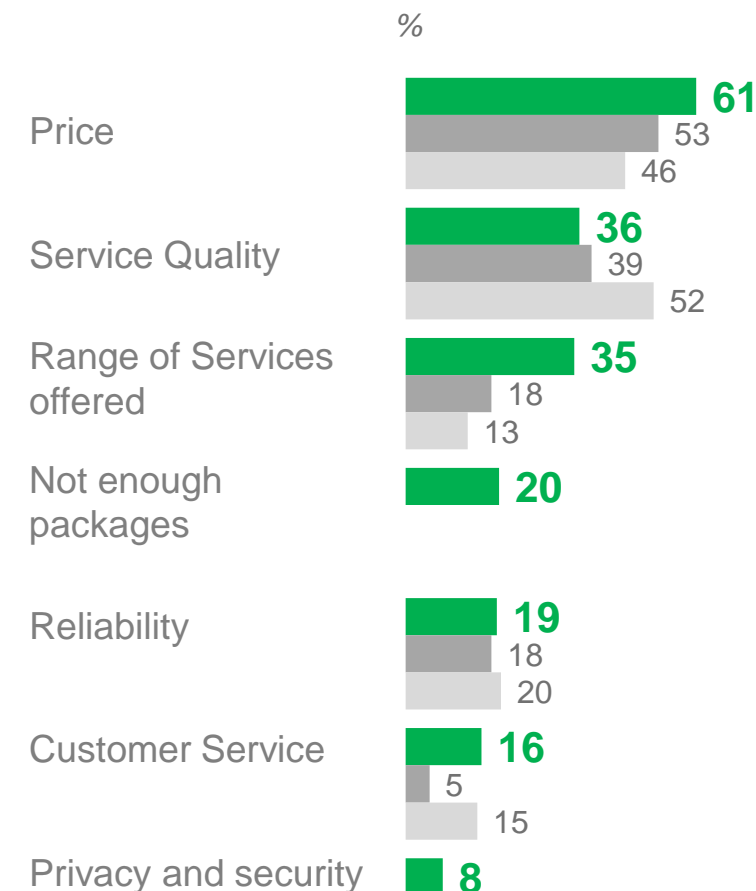
### Switched internet providers in the past

Base: those who have used internet



### Reasons for switching

Base: those who have switched internet provider

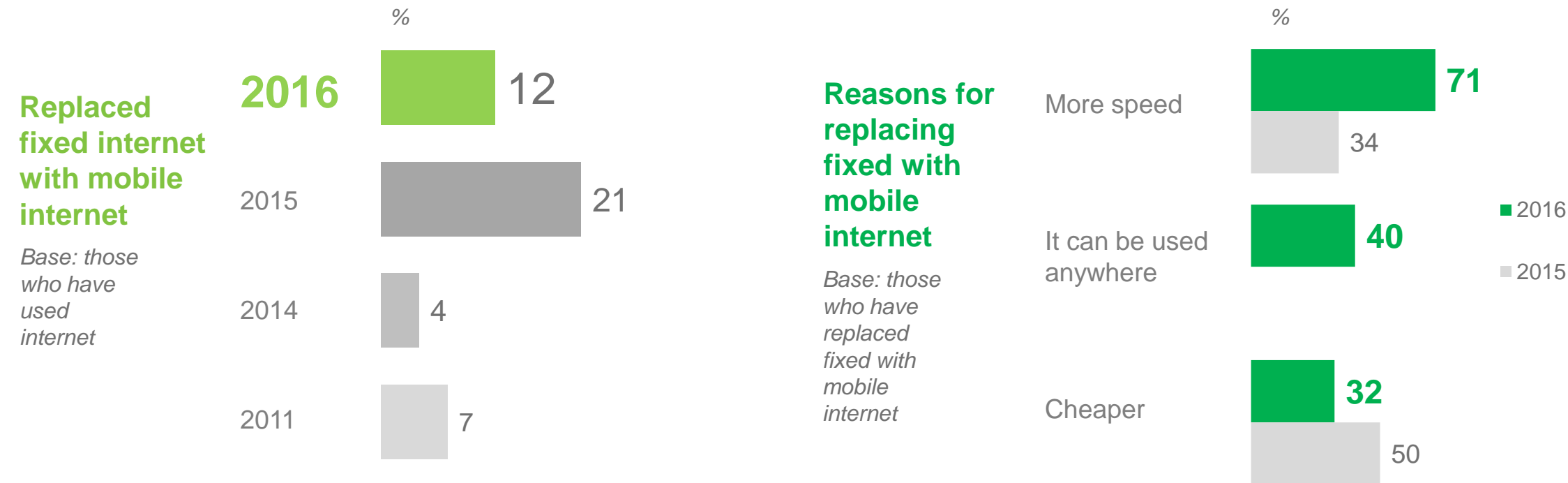


■ 2016 ■ 2015 ■ 2014

Q. Have you ever switched your internet service provider in the past?

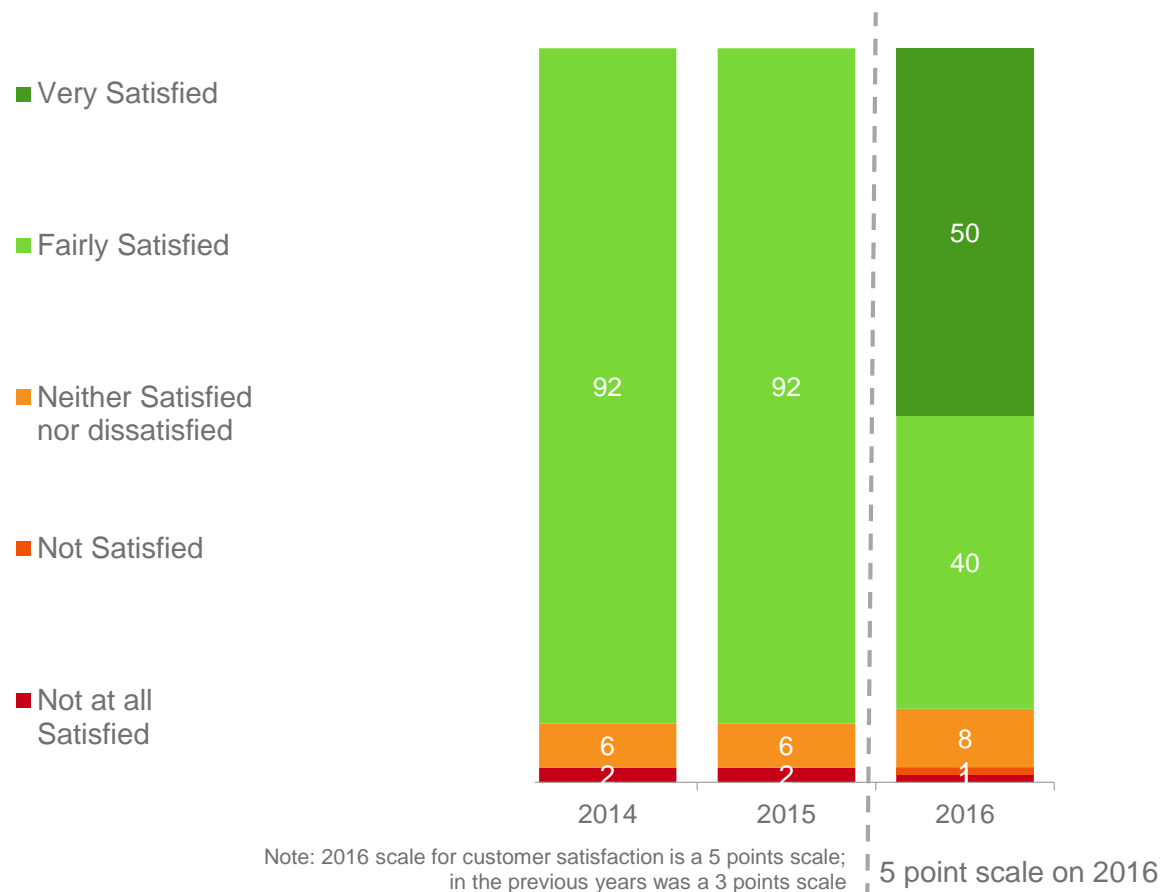
Q. You mentioned that you have switched your internet service provider. Please tell the reason for switching your internet service provider

12% of internet users have replaced their fixed internet with mobile internet and most of them have done so for a better speed and ability to access internet on the go.



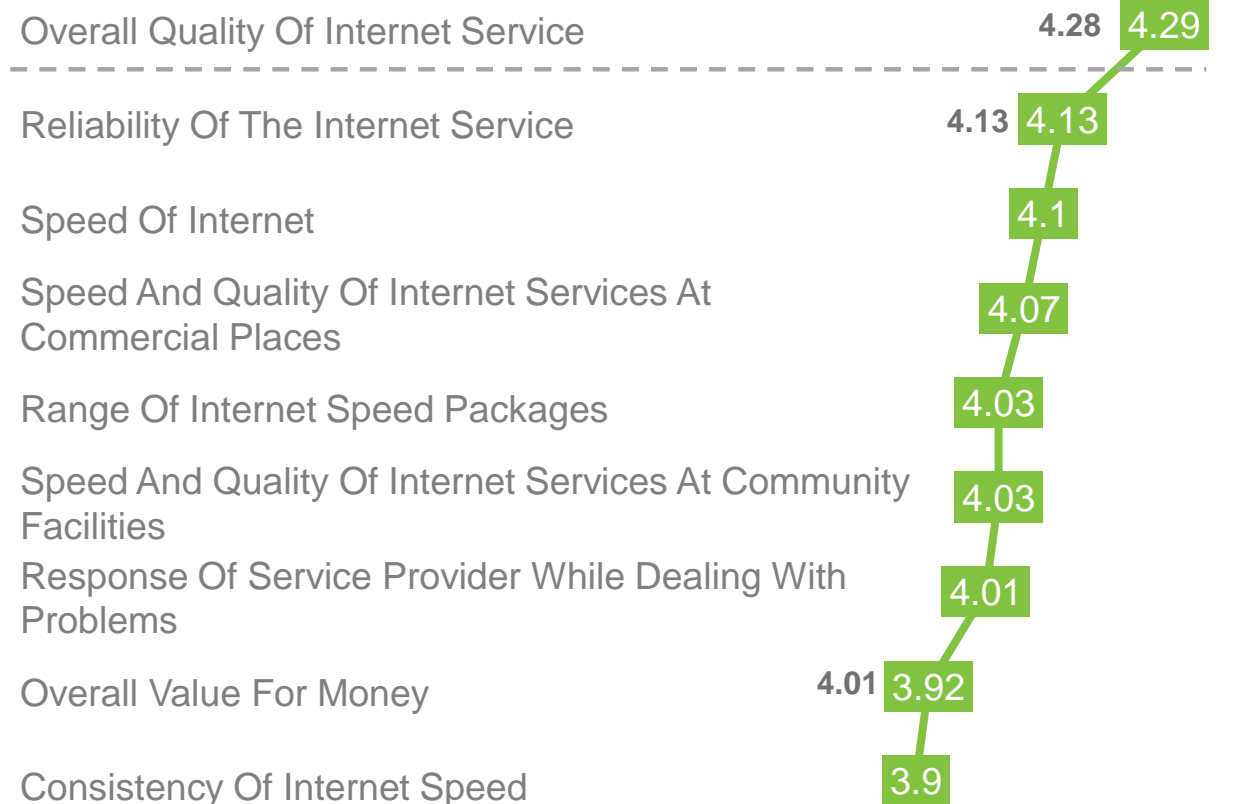
Satisfaction with internet services is generally high. There is scope for improvement on consistency of internet speed and value for money.

## Mobile Overall Satisfaction through the years



## Satisfaction with services

% Base: those who have used internet

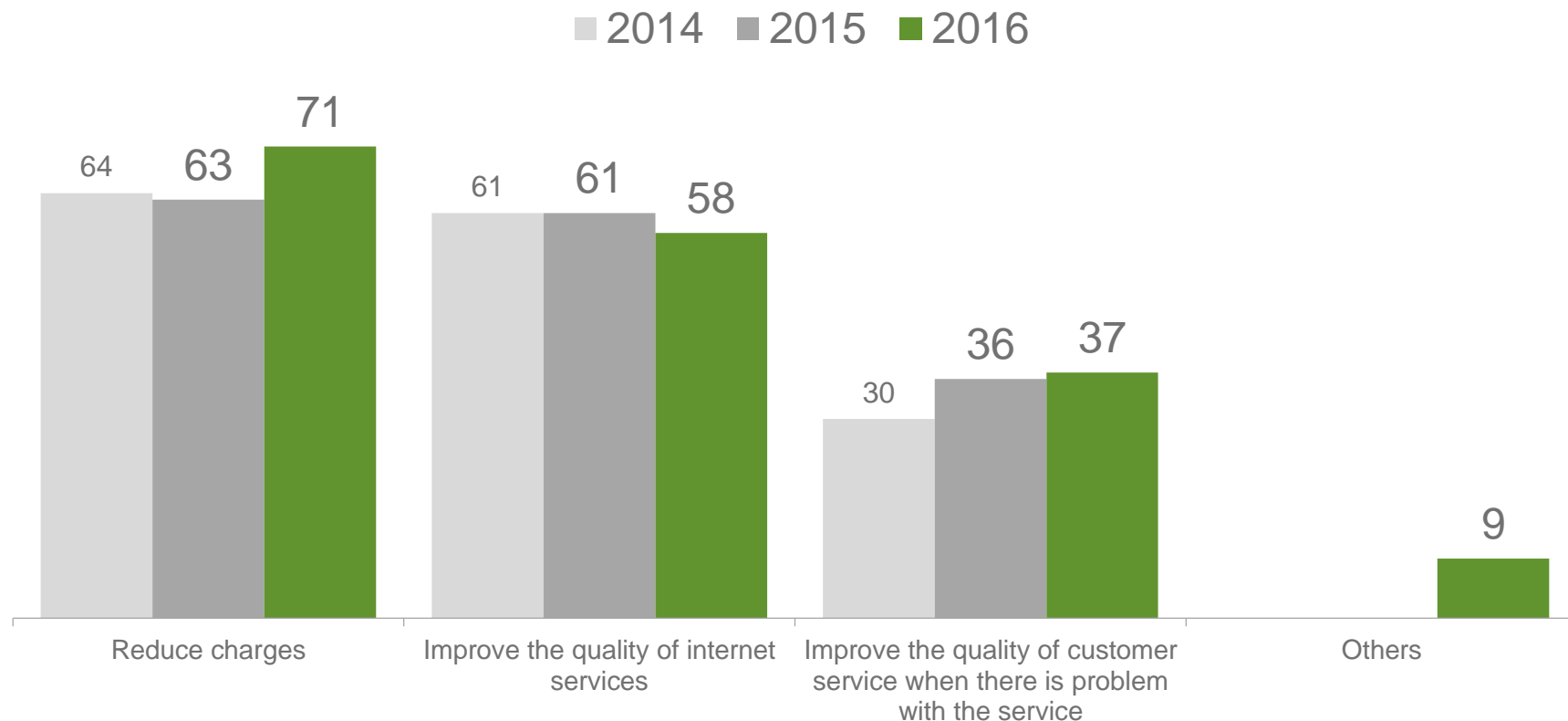


Q. How satisfied are you with the following elements of your internet service?

Reduction of charges is the key suggestion to improve the service.

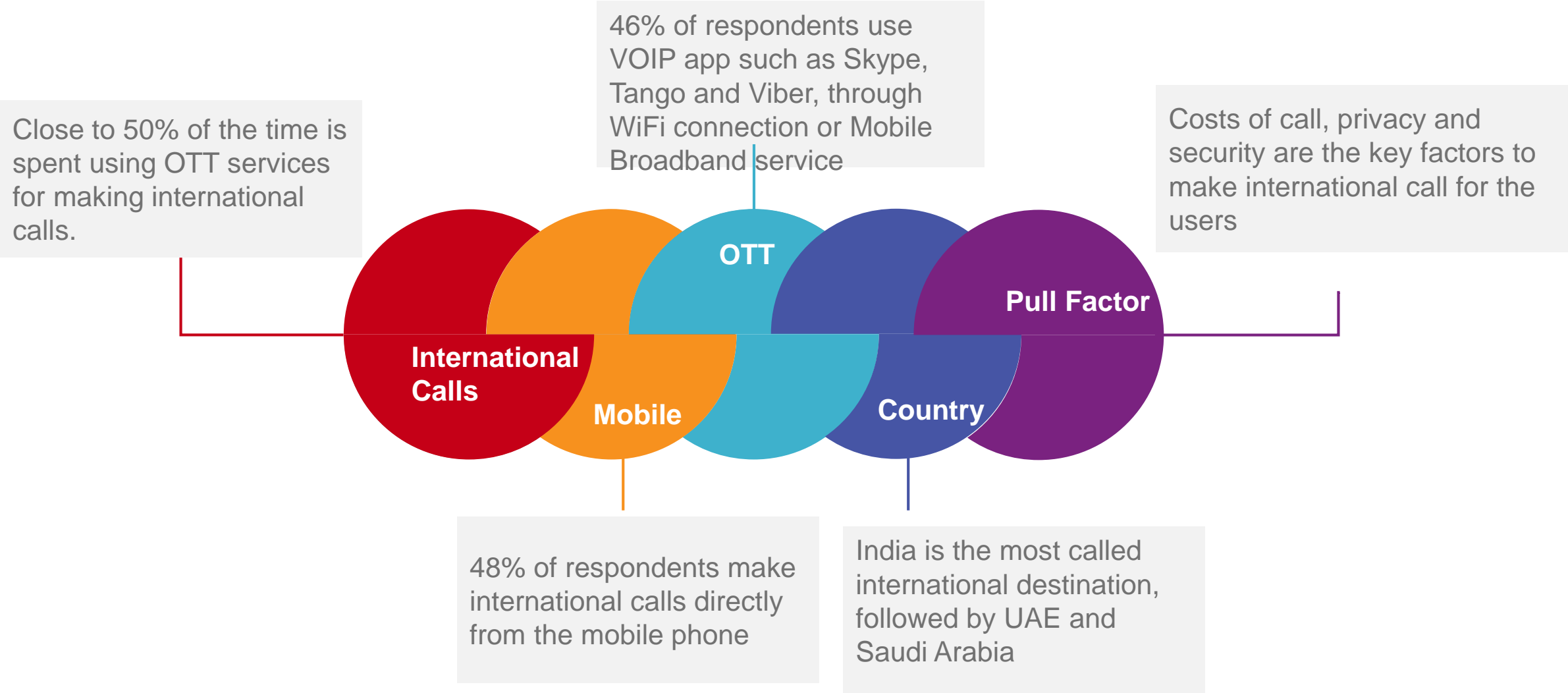
## Suggestions for improvement

Base: those  
who have used  
internet



Q. Could you please tell me if there are any suggestions you would like to make to help serve you better in the future for internet?

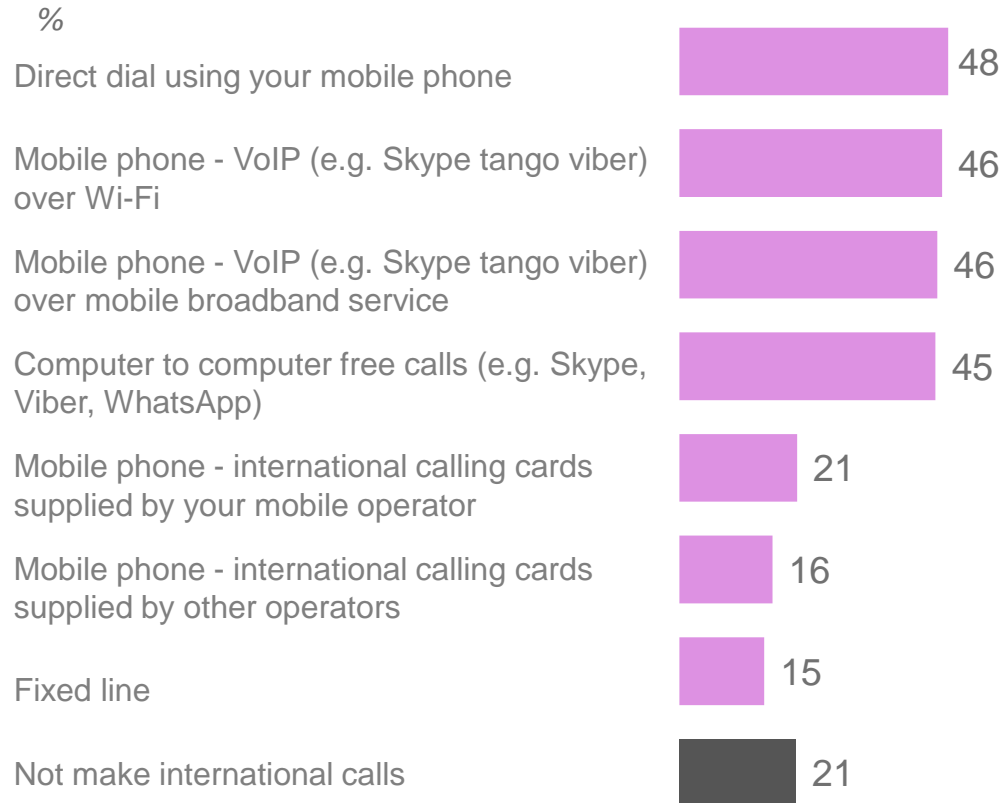
# Key Findings – International calling



48% of respondents make international calls directly with the mobile phone, while 46% use also VOIP app such as Skype, Viber. Currently OTT services are used at least 50% of the time relative to other methods.

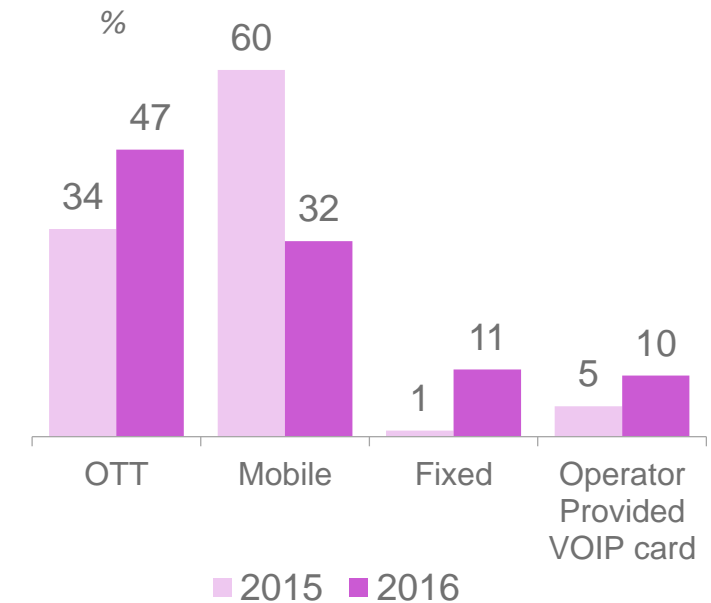
### Method used for making international (IDD) calls

Base: all respondents



### Proportion of international calls by medium

Base: those who make international calls

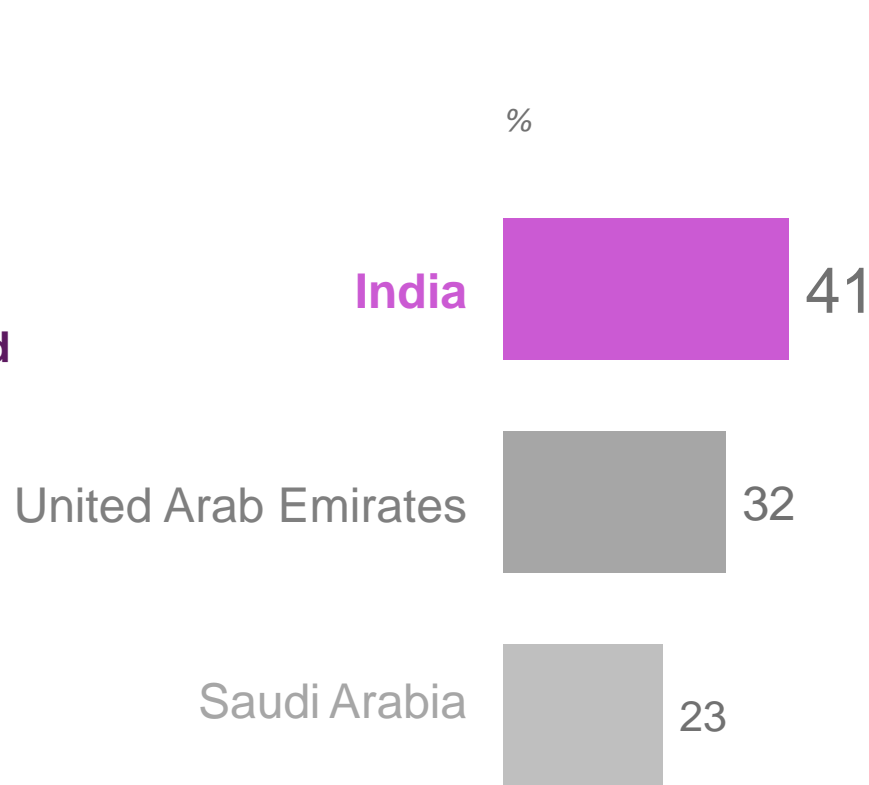




India is the most called international destination and the cost of calls is the most important factor considered when making an international call.

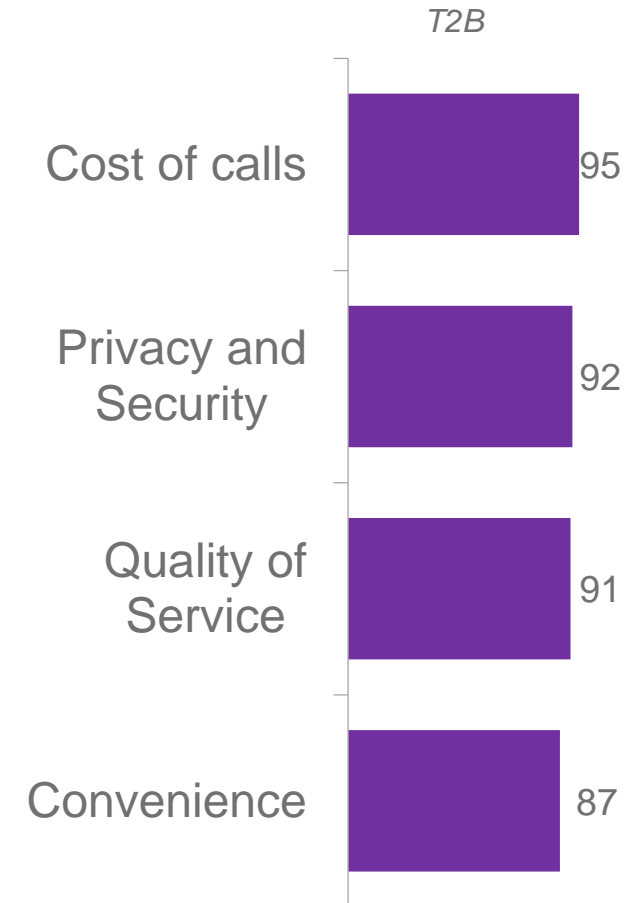
### Countries called to (in order of popularity)

Base: those who make international calls



### Factor important in deciding how to make international calls

Base: those who make international calls



## 3.5

### International Calling

