

# 2011 Business Consumer Survey Report

April 2012

- 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 250 business users and as such may not necessarily represent the market or the population as a whole.

# Overview

<b>1. Introduction</b>	<b>4-6</b>
<b>a. Background</b>	<b>5</b>
<b>b. Research Objectives</b>	<b>6</b>
<b>2. Key Findings</b>	<b>7-11</b>
<b>3. Telecommunications Services</b>	<b>12-56</b>
<b>a. Telecommunications Services for Businesses</b>	<b>13</b>
<b>b. Fixed Line Service</b>	<b>18</b>
<b>c. Mobile Phone Service</b>	<b>30</b>
<b>d. International Calls</b>	<b>40</b>
<b>e. Internet/Data Services</b>	<b>48</b>
<b>4. Awareness of TRA</b>	<b>57-65</b>
<b>a. Awareness &amp; Knowledge of TRA's Services</b>	<b>57</b>
<b>5. Conclusions</b>	<b>66-68</b>
<b>6. Appendix – Research Design &amp; Methodology</b>	<b>69-72</b>



## 1. Introduction

- a. Background
- b. Research Objectives

nielsen  
.....

- The Telecommunications Regulatory Authority of Bahrain (TRA) was created in October 2002. TRA is an independent body which has a direct responsibility to promote consumers' interest and competition in the telecoms sector.
- TRA has commissioned Nielsen to conduct a market research study in 2011 with the objective of better understanding the demand for telecommunications services in Bahrain. This includes usage of and access to telecommunications services across various users as well as consumer awareness of TRA and its role. It also outlines areas of potential improvements.
- Telecoms users are divided into two broad segments (Residential and Business). Thus two separate surveys were conducted.
- This report presents the results of the business survey which was based on 250 face-to-face interviews. The results of the 2011 residential survey can be found at <http://www.tra.org.bh/en/pdf/TRAResidentialModuleF.PDF>
- TRA conducted a similar survey in 2007. The results of the 2007 survey can be found at [http://www.tra.org.bh/en/pdf/Business\\_module\\_findings\\_presentation.pdf](http://www.tra.org.bh/en/pdf/Business_module_findings_presentation.pdf)

- The key objectives of this survey are to understand:

Usage of and Access to all Telecoms  
Services - Fixed Line, Mobile and Internet

Satisfaction with Various Services and  
Switching Behavior

Awareness of TRA and its Roles

- Where appropriate, the results of the 2011 survey have been compared with the 2007 results to identify the key trends during this period.



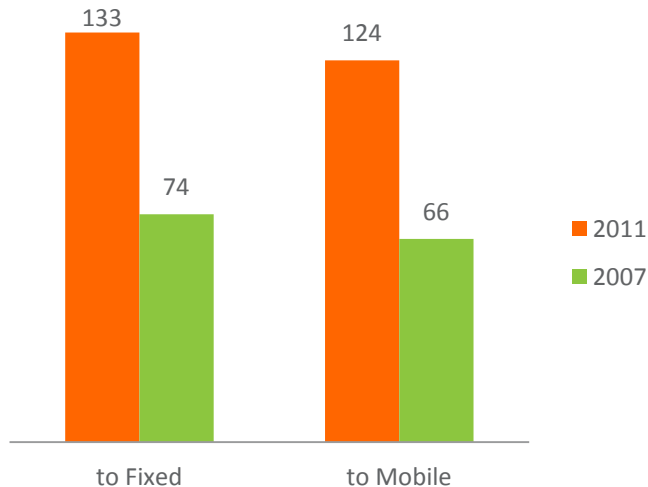
### 3. Key Findings

nielsen  
.....

# Key Findings – Usage of Telecoms Services in Bahrain

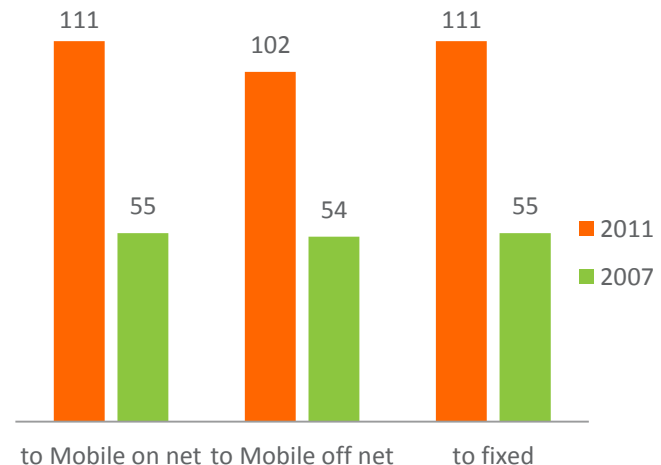
- There has been a substantial increase by more than 70% in the number of fixed calls and mobile calls since 2007.
- On average, businesses make slightly more calls from their fixed lines to other fixed lines than to mobile numbers
- For mobile calls, more calls are made to other mobile phones on the same network than to mobile phones on other networks.

Average Number of National Calls From Fixed Line



Base: All Respondents 2011(n=250), 2007( n=159)

Average Number of National Calls From Mobile Phone

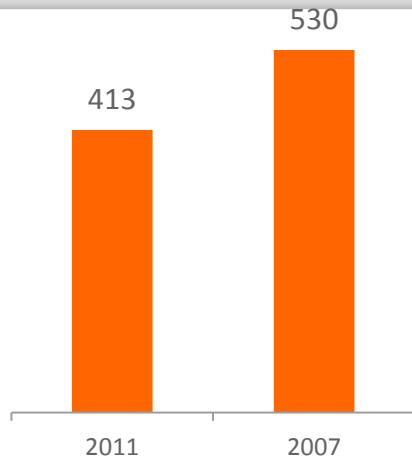


Base: All Respondents 2011(n=250), 2007( n=159)

# Key Findings – Average Monthly Spend

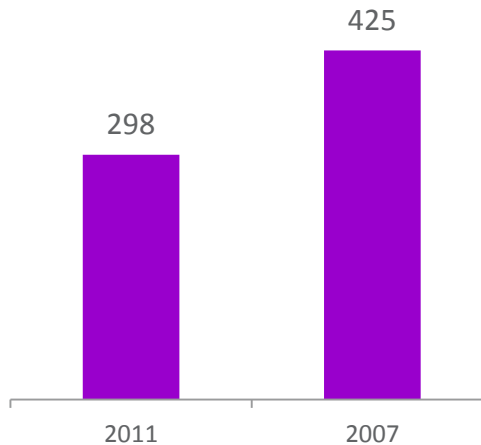
- The average monthly spend of telecoms services has decreased since 2007.
- Although the average number of calls has increased between 2007 and 2011, the average monthly expenditure by businesses for fixed line services dropped by 22%, for mobile services by almost 30% and for data services by more than 50%, as competition intensifies between service providers.

**Fixed Line Monthly Spend  
(Average BD)**



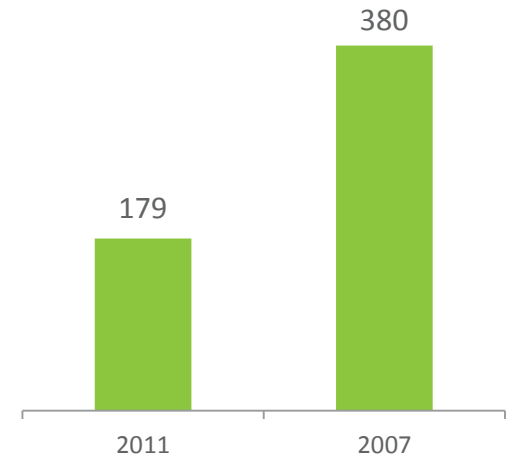
Base: All Respondents 2011(n=250), 2007 (n=159)

**Mobile Phone Monthly Spend  
(Average BD)**



Base: All Respondents 2011(n=250), 2007( n=159)

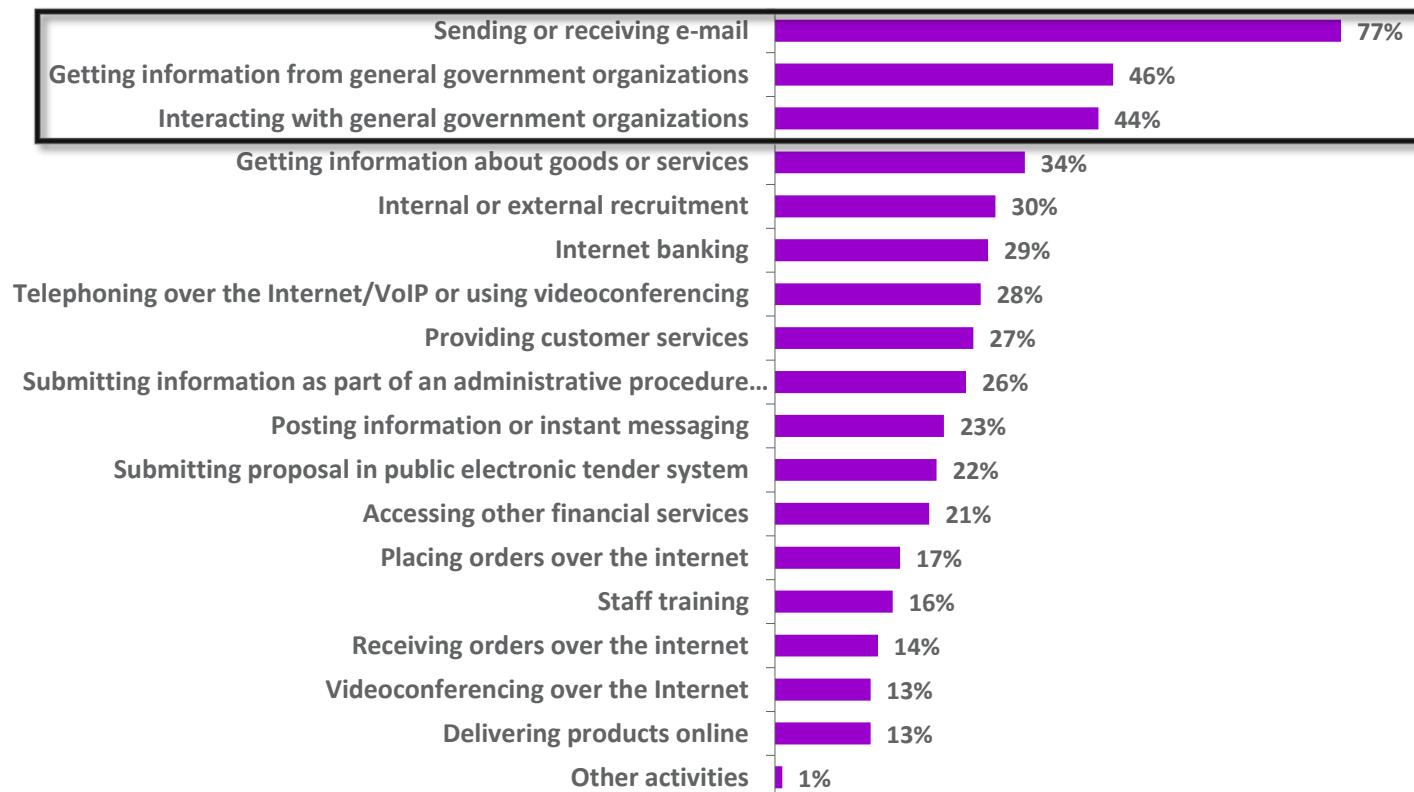
**Data Services Monthly Spend (Average  
BD)**



Base: All Respondents 2011(n=250), 2007( n=159)

# Internet Activities

- The most common uses of the internet are sending and receiving emails (77% of businesses), sourcing information from government organizations (46%), and interacting with government organizations (44%).



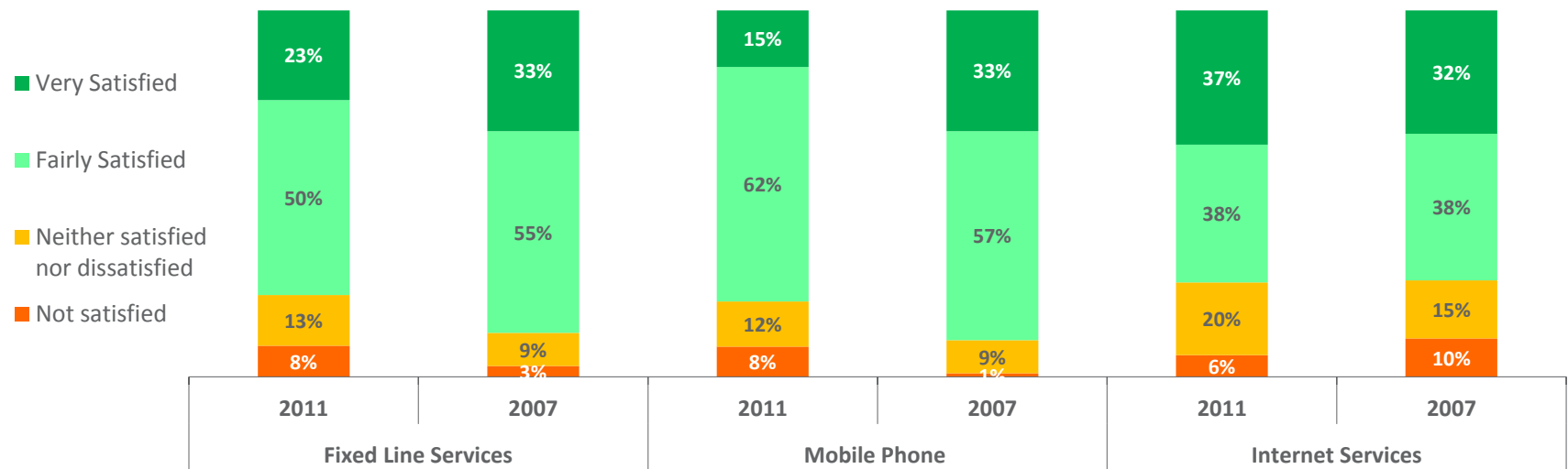
Base: All Respondents who have access to net 2011 (n=218)

Q5a. Please look at this card and tell us which of the following internet activities are undertaken in your organization?

# Key Findings – Satisfaction with Telecoms Services

- The majority of respondents are satisfied with their telecommunications services; 73% of businesses are satisfied with their fixed line services, 77% with their mobile services and 75% with their internet services.
  - However, satisfaction with fixed line and mobile services has decreased since 2007 while satisfaction with internet service has improved from 70% in 2007 to 75% in 2011.

Overall Satisfaction with Telecoms Services



Base: All Respondents 2011 (n=250)



### 3. Telecoms Services

#### a. Telecommunications Services for Businesses

b. Fixed Line Service

c. Mobile Phone Service

d. International Calls

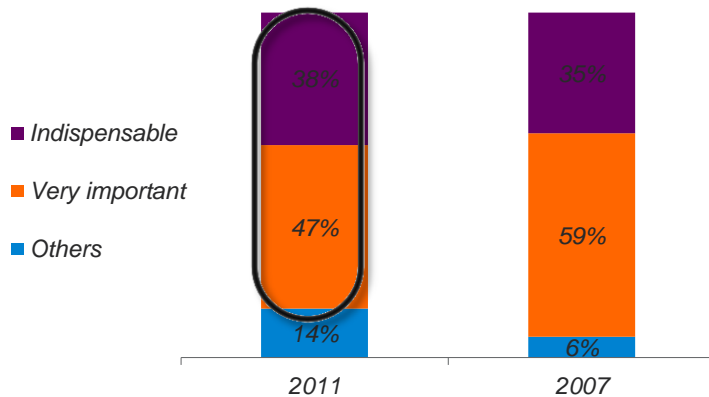
e. Internet/Data Services

nielsen  
.....

# Importance of Telecommunications Services

- Telecommunications services are critical to running many businesses.
  - As expected, for the majority of businesses, telecoms is an integral part of their operations.
  - The importance of telecoms services increases with the size of business

## Importance of Telecommunications for Business



Base: All Respondents 2011 (n=250) , 2007 (n=159)

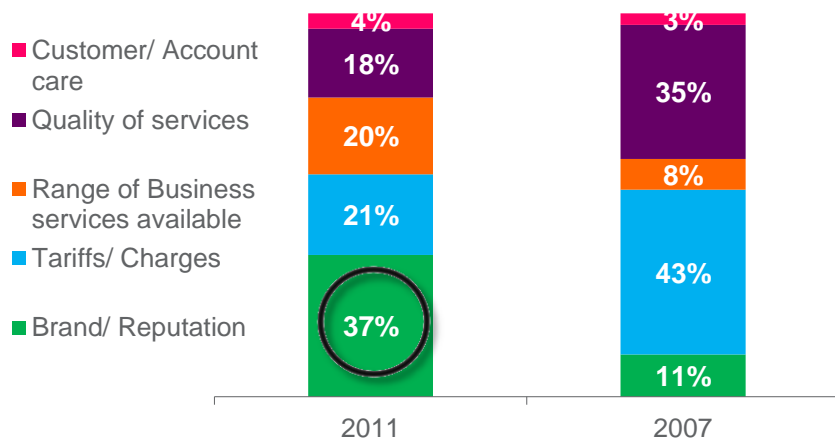
	Less than 20 employees	20-99 employees	100+ employees
<b>Base</b>	113	73	64
<b>Indispensable</b>	35%	37%	47%

B1. Please see this card and tell me on an overall basis, how important telecommunication is for running your business?

# Important Factors for Selecting Telecoms Services Provider

- When selecting a telecoms services provider, the majority of businesses place significant importance on “Brand and Reputation” of providers (37%), compared with “Tariffs and charges” (21%) which was the most important factor in 2007.
  - 31% of large businesses consider the range of business services available as the most important factor when selecting a telecoms services provider.

Important Factors For Fixed/Mobile Service Provider



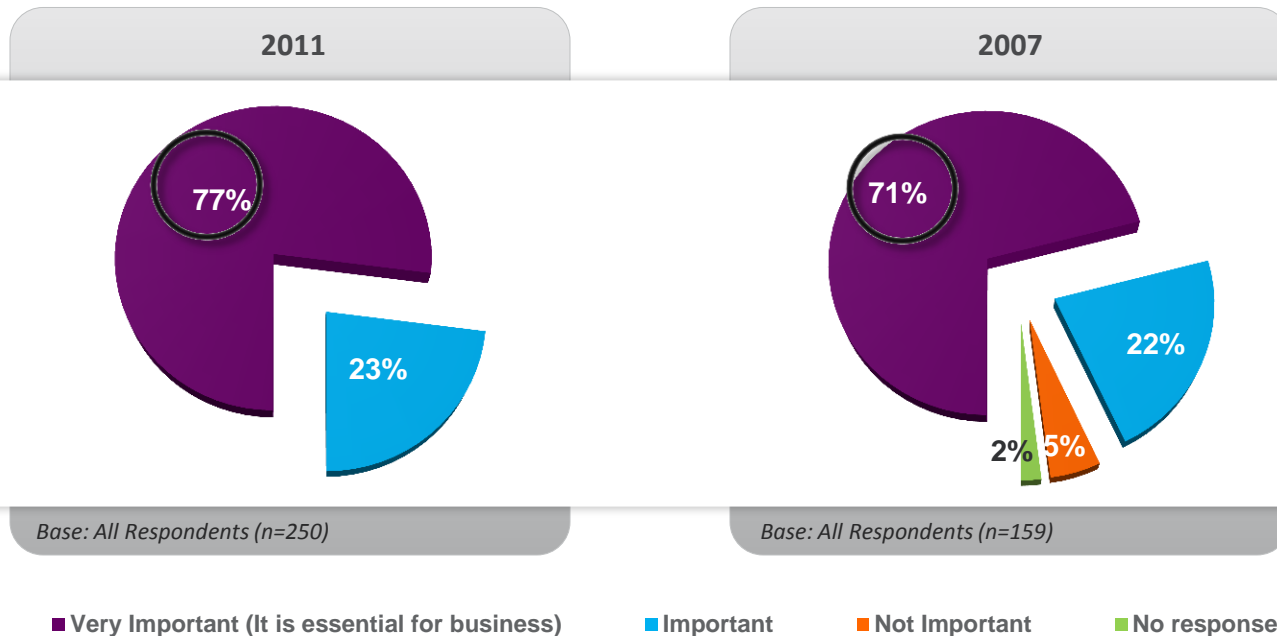
Base: All Respondents 2011 (n=250) , 2007 (n=159)

Rank 1	Less than 20 employees	20-99 employees	100+ employees
Base	113	73	64
Brand / Reputation	44%	36%	27%
Tariffs / Charges	17%	22%	28%
Range of business services available	18%	15%	31%
Quality of Services	19%	19%	13%
Customer/account care	2%	8%	2%

B30. Companies look at different parameters while selecting a new service provider for fixed line and mobile. We have put some of these on this card. Please rank them as per their importance for your company ?

# Importance of maintaining existing Phone Number

- Retaining existing telephone number is very important for businesses.
- All business representatives (100%) say it is either important or very important to retain their telephone number in 2011 compared with 93% in 2007.
- More than 75% say it is extremely important to retain the existing number as it avoids disruptions to communications with company's stakeholders and clients.

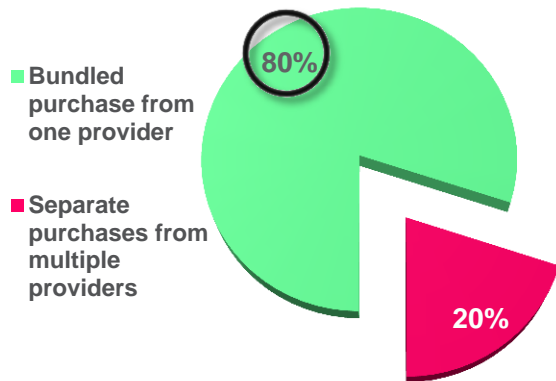


B28. Tell me if you are thinking about changing your telecoms provider both for mobile and fixed line, how important would it be to retain your existing telephone number(s)?

# Purchasing Method & Tender Process

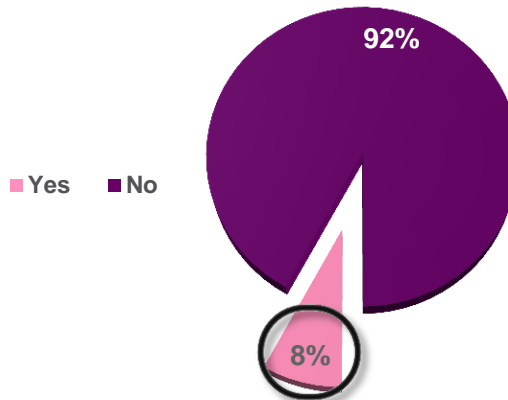
- 80% of the businesses purchase their telecoms services as a bundle from a single supplier, but only 8% hold a tender process.
- The proportion of businesses holding a tender process increases with business size, with 19% of large businesses holding tenders compared with only 3% of small businesses.
- Of those businesses holding competitive tenders, the most common frequency is on a yearly basis (48%).

Purchasing Method



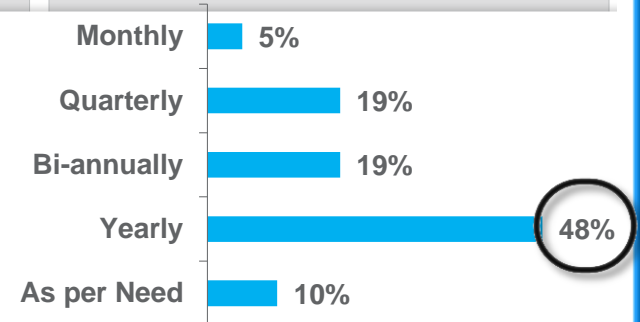
Base: All Respondents 2011(n=250)

Holding Tendering Process



Base: All Respondents 2011(n=250)

Frequency of Holding Tendering Process



No. of Bids Typically Received in one Process (Mean) 6\*

Base: Those who hold tender process (n=21\*)

P6. Considering the overall purchase decision-making of telecom services, do you purchase all together as a 'bundled' purchase such as one telecom provider supplies all services as part of a single contract or separating services and purchasing from multiple providers such as fixed services from one provider and mobile services from another and so on?

P7. Do you hold competitive tendering process for telecom services you consider purchasing and invite service providers to submit relevant bids?

P8. How often do you hold tender process?

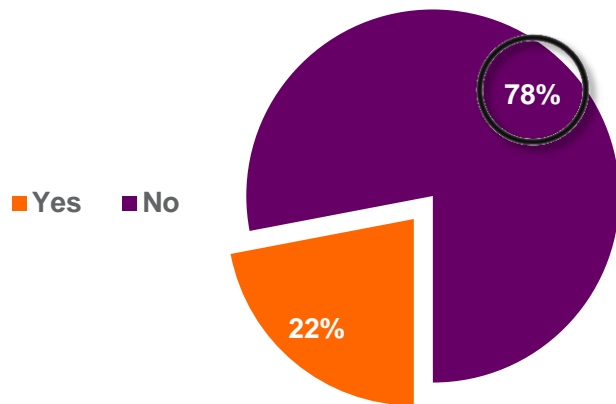
P9. How many bids do you typically receive from different suppliers in one tender process?

\* Low Base

# Recruitment of Employees with ICT Skills

- ICT-skilled staff are vital for organizations in order to cope with IT issues.
  - Only 22% of businesses reported difficulties in recruiting employees with the necessary ICT skills.

**Having Difficulties in Recruiting ICT-Skilled Staff**



Base: All Respondents 2011 (n=250)

	Less than 20 Employees	20-99 Employees	100+ Employees
<i>Base:</i>	113	73	64
Those who have difficulty in recruiting employees with ICT Skills	19%	25%	25%

Q1c. Do you have difficulties in recruiting employees with ICT skills?

### 3. Telecoms Services

- a. Telecommunications Services for Businesses
- b. Fixed Line Service**
- c. Mobile Phone Service
- d. International Calls
- e. Internet/Data Services

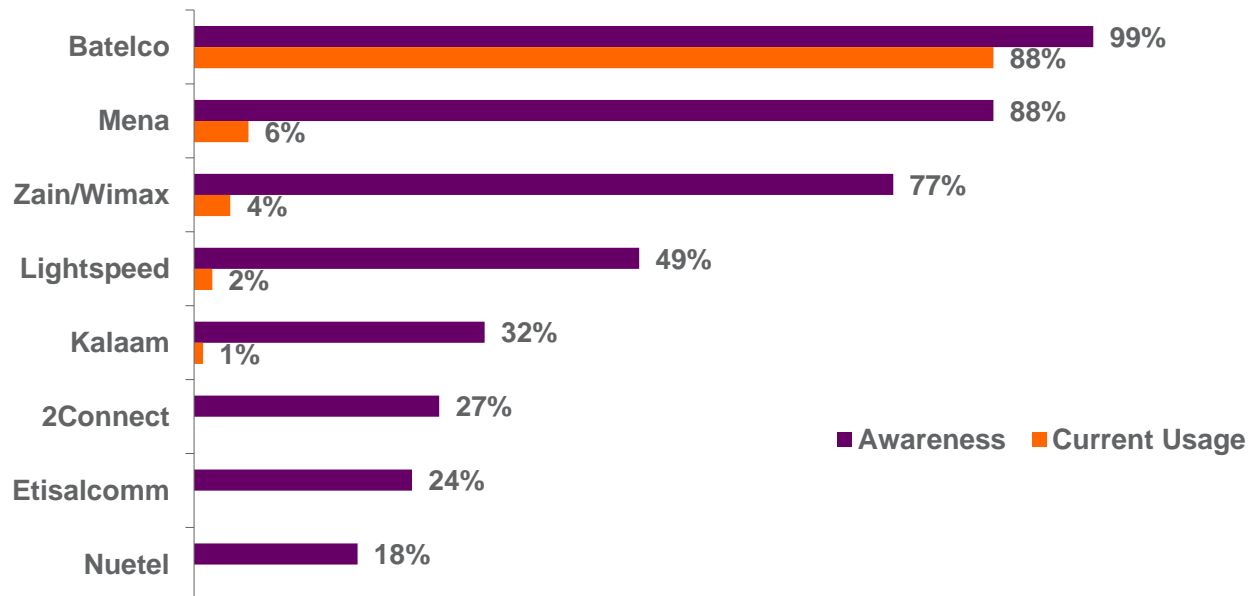


nielsen  
.....

# Fixed Line Service Providers

- 99% of the businesses are aware of Batelco closely followed by Mena (88%) and Zain (77%).
  - Awareness of service providers is generally higher amongst larger businesses.
- Batelco is extensively used by businesses in comparison with other fixed line service providers.

Service Provider Awareness & Current Usage



Base: All Respondents 2011 (n=250)

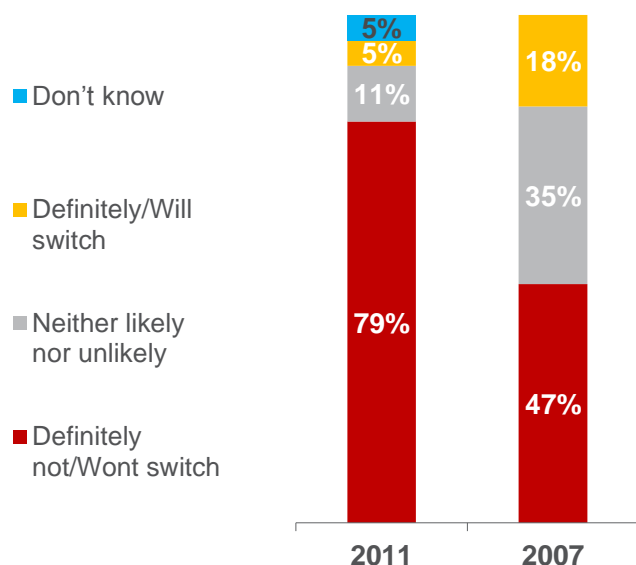
B8a. Please tell me which of the following fixed line service providers are you aware of?

B8b. And from which of these do you currently subscribe fixed lines from?

# Switching Interest

- 79% of businesses are not likely to switch from their current fixed line provider. The main reason given for not switching in 2011 was because of businesses are happy with their current service provider.
- Of those who said they are likely to change their fixed line providers, pricing and promotions were important reasons given.

## Likelihood To Switch



Base: All Respondents 2011 (n=250) , 2007 (n=159)

## Top two reasons for switching to another provider

2011		2007	
Base: Who are likely to switch	11*	Base: Who are likely to switch	28
Cheaper Charges	27%	Cheaper Price	50%
More promotions	18%	Better Service	43%

## Top two reasons for not switching

Base: Who are likely <u>not</u> to switch	199	Base: Who are likely <u>not</u> to switch	75
Happy with current provider	63%	Don't want to change the number	36%
Difficult to switch to other provider	30%	Satisfied with Batelco	27%

B25a. how likely is your company to switch to another telecom service provider for Fixed Line?

B26. You mentioned that (response of B25a) for fixed line. Please tell me why do you say so?

\* Low Base

# Type of Fixed Line Connections

- Fixed Voice and Fax lines are the most commonly used type of connection by businesses.
  - As expected the average number of lines increases with the size of businesses.
  - The average number of fixed lines used by large businesses has significantly increased since 2007.

2011

Average No of Lines	Total	Less than 20 Employees	20-99 Employees	100 & + Employees
<i>Base:</i>	250	113	73	64
Fixed Voice lines	10	2	3	27
Fax lines	5	1	2	14

2007

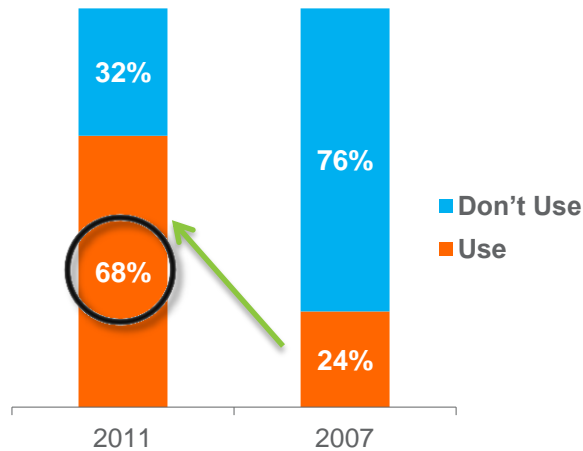
Average No of Lines	Total	Less than 20 employees	20-99 employees	100+ employees
<i>Base</i>	159	66	65	28*
Fixed Voice lines	4	2	4	11
Fax lines	2	1	2	4

B2. Please see this card and tell me and how many lines do you have for each of the following?

# Private Network (LAN) to make National Calls

- Usage of Private Network (LAN) for making National calls has increased significantly, particularly among small and medium- sized businesses.

Usage of LAN to make national calls



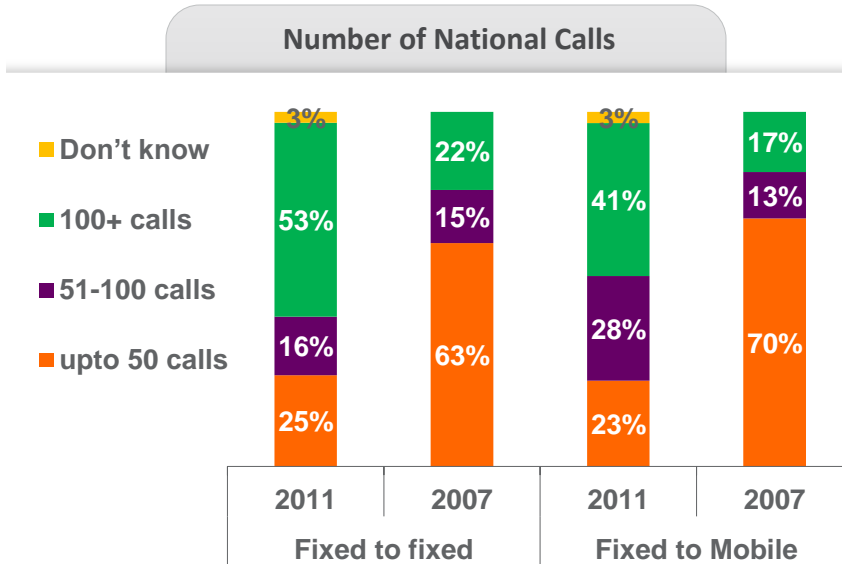
Base: All Respondents 2011 (n=250) , 2007 (n=159)

	Less than 20 Employees		20-99 Employees		100 & + Employees	
	2011	2007	2011	2007	2011	2007
Base –	113	66	73	65	64	28
Using a Private Network (LAN) to make national calls between offices	58%	9%	73%	22%	81%	64%

B9. Does your company/office/site use a LAN to make national calls between offices/sites within Bahrain?

# Number of National Calls made

- The number of national calls has increased since 2007, with the proportion of businesses making more than 100 fixed to fixed calls per day increasing from 22% in 2007 to 53% in 2011.
- There has been a significant increase in the average number of national calls made since 2007 across all sizes of businesses.
  - On average businesses made 133 fixed to fixed national calls per day in 2011 (up from 74 calls in 2007) and 124 fixed to mobile national calls per day in 2011 (up from 66 calls in 2007).



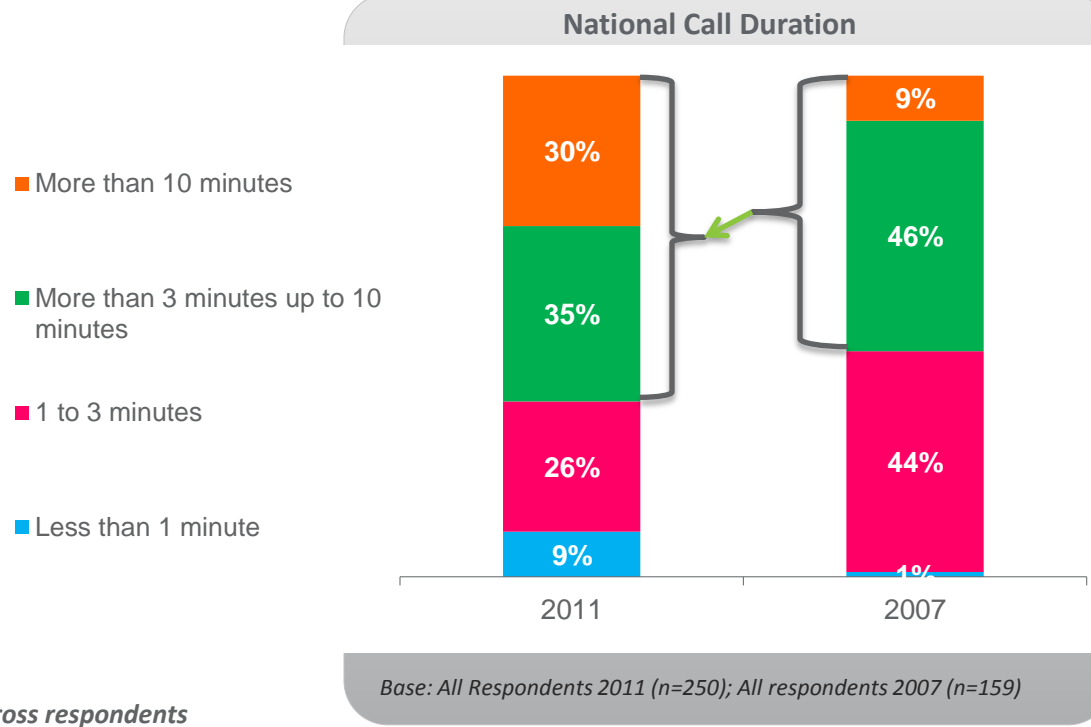
Base: All Respondents 2011 (n=250), 2007 (n=159)

Average number of National calls	Total	Less than 20 Employees	20-99 Employees	100 & + Employees
<i>Base-2011</i>	250	113	73	64
Fixed to Fixed	133	93	136	192
Fixed to Mobile	124	90	124	177
<i>Base-2007</i>		66	65	28
Fixed to Fixed	74	30	90	135
Fixed to Mobile	66	35	65	140

B15. Now I would like to know the number of national calls made through fixed line and mobile?

# Duration of National Calls made from Fixed Lines

- The average duration of national calls made from fixed lines has also increased since 2007, with the proportions of calls lasting more than 3 minutes increasing from 55% in 2007 to 65% in 2011.

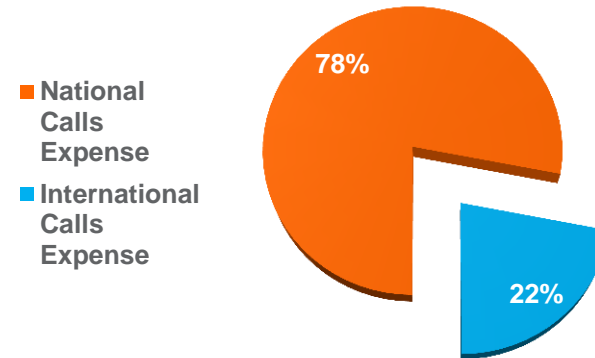


B17a. Could you please tell me what proportion of the national (local) calls will fall under these durations from fixed line?

# Fixed Line Expenditure

- For businesses, national calls represent a significant proportion (78%) of fixed line expenditure.
- Average monthly expenditure on fixed line services has dropped by 22% since 2007.
  - However, average monthly spend on fixed line by small businesses has increased from BD200 in 2007 to BD220 in 2011. This might be explained by the relatively large increase in national calling volumes made by small businesses (nearly 210%).

Fixed line expense (proportion for Inter/National calls)



Base: All Respondents 2011 (n=250)

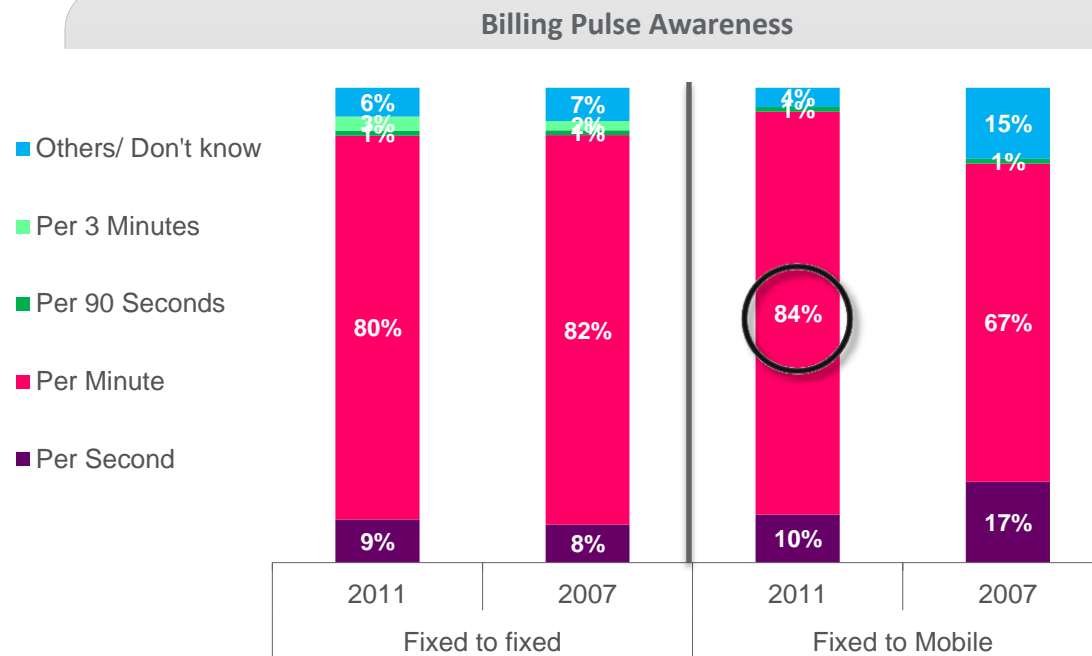
Average Monthly Expense on Fixed Line	Total	Less than 20 Employees	20-99 Employees	100+ Employees
<i>Base-2011</i>	250	113	73	64
(BD)-Mean	413	220	382	744
<i>Base-2007</i>	159	66	65	28
(BD)-Mean	530	200	625	1,100

B13. What percentage of the total telecom spend from fixed lines is on National and International Calls?

P4a. Could you please tell me what is your average monthly spend on Fixed Line ?

# Tariff Awareness

- Most businesses think that they are charged per minute, although in respect to Batelco, the actual billing unit varies according to the type of call being made (i.e. fixed to fixed or fixed to mobile).
  - This percentage has increased between 2007 and 2011 for fixed to mobile calls (from 67% in 2007 to 84% in 2011) and decreased slightly for fixed to fixed calls (from 82% to 80%).



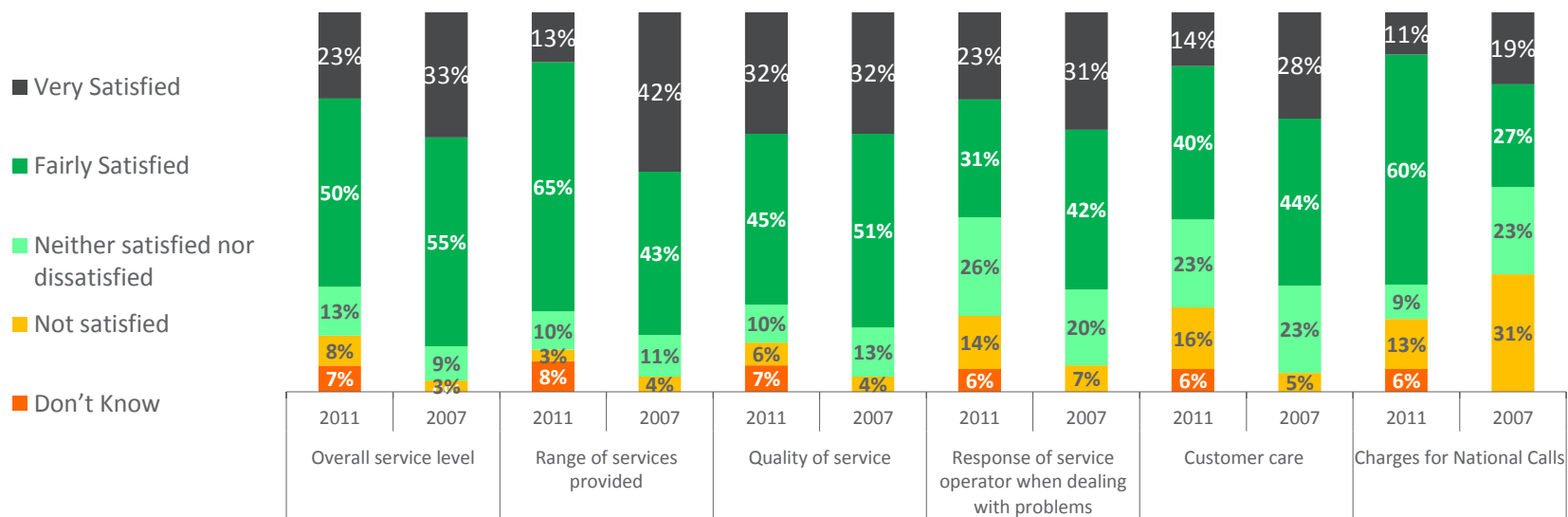
Base: All Respondents 2011 (n=250), 2007 (n=159)

B29a. How do you think your current telephone provider charges you for a fixed-to-fixed National Call?  
 B29b. How do you think your current telephone provider charges you for fixed-to-mobile National Call?

# Satisfaction Levels - Fixed Line Service

- Satisfaction levels among businesses are relatively high for the overall fixed line service level, range of the services, quality of services and national call charges and lower for operators response and customer care.
  - However, satisfaction with fixed line services has decreased slightly since 2007 in most areas, except in charges for national calls (71% of businesses were satisfied with national calls charges compared to only 46% in 2007).

Satisfaction with Fixed Line



Base: All Respondents 2011 (n=250), 2007 (n=159)

B23. How satisfied are you with the following elements of your fixed line service?

# Summary of Fixed Line Service

- Batelco is the most recognized and used fixed line service provider. Although businesses have a high level of awareness of other fixed line service providers, they tend not to use them.
- 79% of businesses are not likely to switch from their current fixed line provider. The main reason given for not switching in 2011 was because of businesses are happy with their current service provider.
- Fixed Voice and Fax lines are the most commonly used type of fixed line connection by businesses.
- Usage of Private Networks (LANs) for making National calls has increased significantly, particularly among small and medium- sized businesses.
- On average businesses made 133 fixed to fixed national calls and 124 fixed to mobile national calls per day, which represents a significant increase compared to 2007.
- The average duration of national calls made from fixed lines has increased since 2007.

# Summary of Fixed Line Service

- For large & medium businesses, average monthly expenditure on fixed line services has decreased since 2007. However, the average monthly spend by small businesses has slightly increased, from BD200 in 2007 to BD220 in 2011.
- Satisfaction levels among businesses are relatively high for the overall fixed line service level (73%), range of the services, quality of services and national call charges, but low for operators' response and customer care.

### 3. Telecoms Services

- a. Telecommunications Services for Businesses
- b. Fixed Line Service
- c. Mobile Phone Service**
- d. International Calls
- e. Internet/Data Services



nielsen  
.....

# Company Provision of Mobile Phones

- Compared with 2007, the proportion of businesses who provide mobile phones to employees has increased by more than 30% .
  - All large businesses provide mobiles to their employees.
- Mobile workforce is the main reason for using mobile phones (42%) closely followed by expenditure control (37%)

	Less than 20 Employees	20-99 Employees	100 & + Employees
<i>Base: All Respondents</i>	113	73	64
Provision of Mobiles to Employees (%)	76%	86%	100%

Reasons for providing Mobile Phones	2011	2007
<i>Base:</i>	250	159
Mobile Workforce	42%	75%
Can control spending	37%	14%
Availability of additional services	31%	25%
Quality services	23%	31%

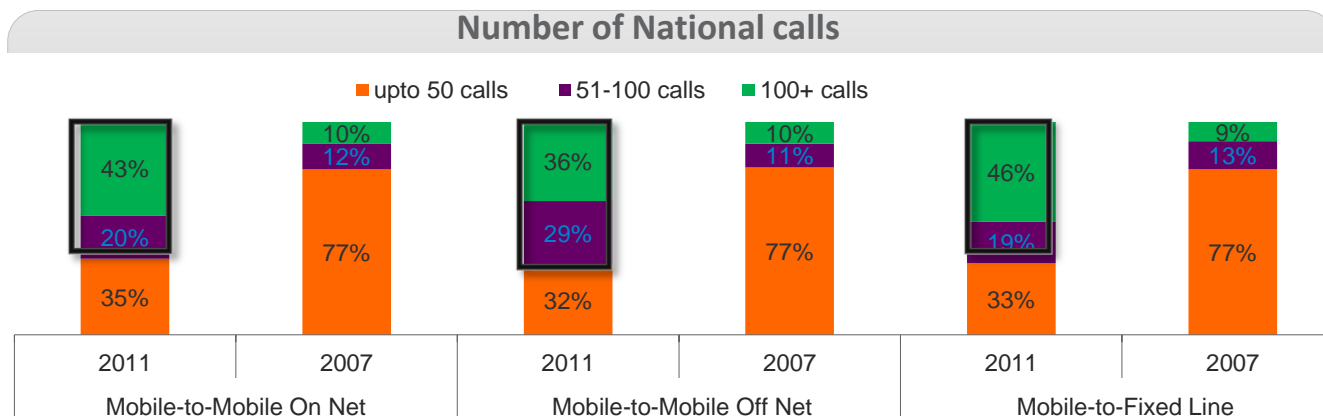
Provision of mobile phones to employees



Q11a. Does the company provide mobile phones to staff? Q11b. How many staff are provided with a pre-paid mobile phone? Q11c. How many staff are provided with a post-paid mobile phone?, B11. What are the main reasons that your company uses mobile phones?

# National Calls made from Mobile

- There has been a significant increase in the volume of national calls made per day since 2007.
  - The majority of businesses (63%) now make more than 50 national calls per day from their mobile phones.
- On average businesses made 111 mobile to mobile on net calls and 102 mobile to mobile off net national calls per day.



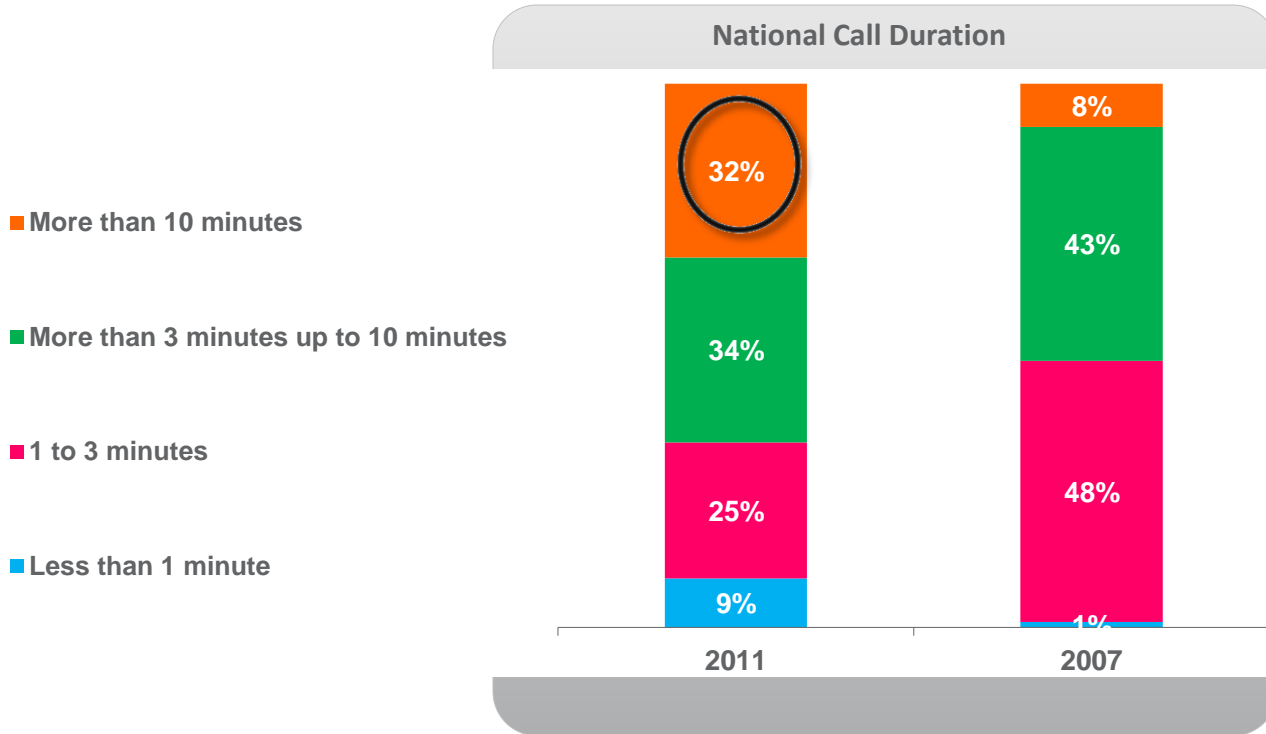
Base: All who have mobile connections in their name 2011 (n=213) , 2007 (n=102)

Average number of National calls	Total	Less than 20 Employees	20-99 Employees	100 & + Employees
<i>Base-2011</i>	<b>213</b>	<b>86</b>	<b>63</b>	<b>64</b>
Mobile to Mobile On Net	<b>111</b>	<b>74</b>	<b>119</b>	<b>159</b>
Mobile to Mobile Off Net	<b>102</b>	<b>69</b>	<b>109</b>	<b>145</b>
Mobile to Fixed line	<b>111</b>	<b>80</b>	<b>121</b>	<b>147</b>

B15. Now I would like to know the number of national calls made through fixed line and mobile?

# Duration of National Calls from Mobile

- As for fixed line services, the duration of national calls made from mobile phones has increased since 2007, with 32% of calls lasting for more than 10 minutes (up from 8% in 2007).



## Average scores across respondents

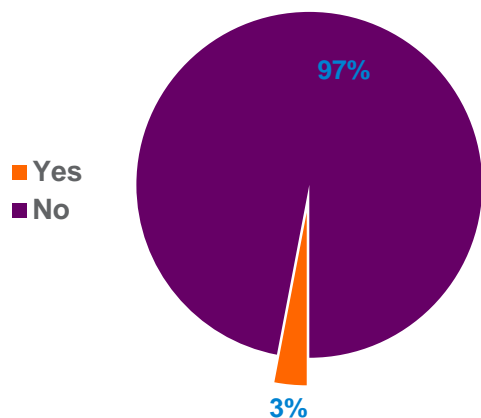
Base: All who have mobile connections in their name 2011  
(n=213) 2007 (n=102)

B17b Could you please tell me what proportion of the national (local) calls will fall under these durations from fixed line?

# Switching Experience

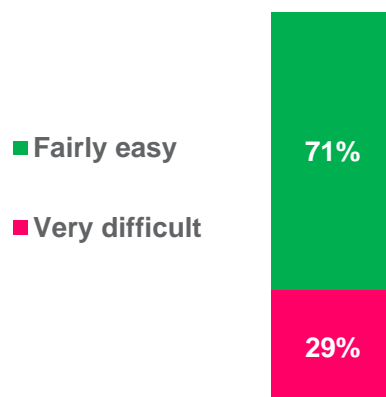
- Only 3% of businesses have ever switched of mobile service provider.
- The majority of businesses who have switched found changing the service provider was easy (71%).
- The main reason for switching was to reduce costs.

Ever Switched Mobile Operators



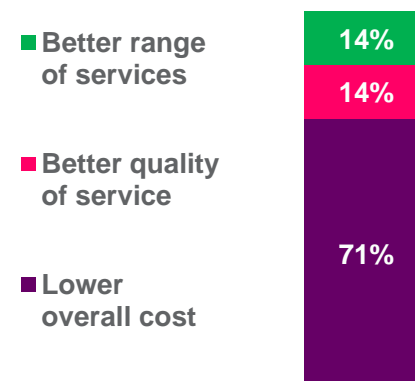
Base: All Respondents 2011 (n=250)

Ease In Switching



Base: Those who switched (7\*)

Reasons For Switching  
(Choice Given Rank 1)



Base: Those who switched (7\*)

B31. Now I wanted to know specifically for mobiles, has your company / site ever switched mobile operators?

B32. Please take a look at this card and tell me how easy was it for your company to switch to another mobile operator?

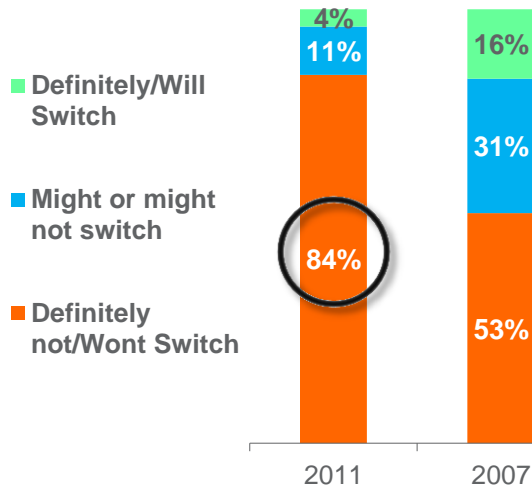
B33. You mentioned that you have switched mobile service providers. Please rank these reasons for your doing so?

\* Low Base

# Switching Inclination – Mobile Services

- 84% of businesses are unlikely to switch from their current mobile service provider.
- The primary reasons given for not switching are that they are happy with their current mobile service provider (71%) and the impression that it is difficult to switch (21%), whereas in 2007 the main reason for not switching given by businesses was they don't want to change their number.

## Likelihood to Switch



Base: All provided mobile phone by companies  
2011 (n=213) , 2007 (n=102)

## Top Two Reasons for Not Switching from Current Mobile Service Provider

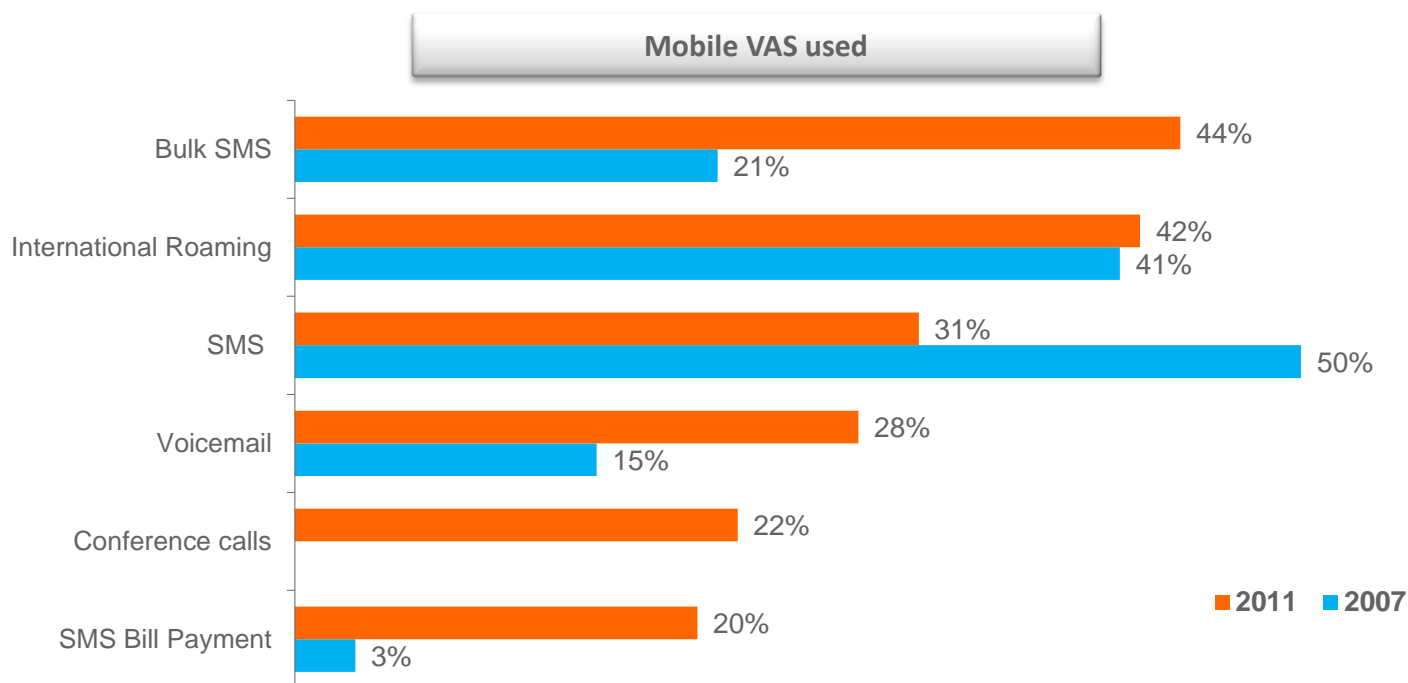
Base: Those who would not switch 2011	178	Base: Those who would not switch 2007	54
Happy with current provider	71%	Don't want to change the numbers	41%
Difficult to switch to other provider	21%	Satisfied currently with existing provider	24%

B25b. How likely is company to switch the mobile service provider?

B27. You mentioned that (OPTION CODED FOR MOBILE IN B25b) for mobile. Please tell me why do you say so?

# Mobile Value Added Services

- Bulk SMS (44%) and International roaming (42%) are the main value added services used by businesses.
- There has been a significant increase in the use of bulk SMS, voicemail and SMS bill payment since 2007.
- Bulk SMS is significantly used by large businesses (67%) compared to medium and small sized businesses.



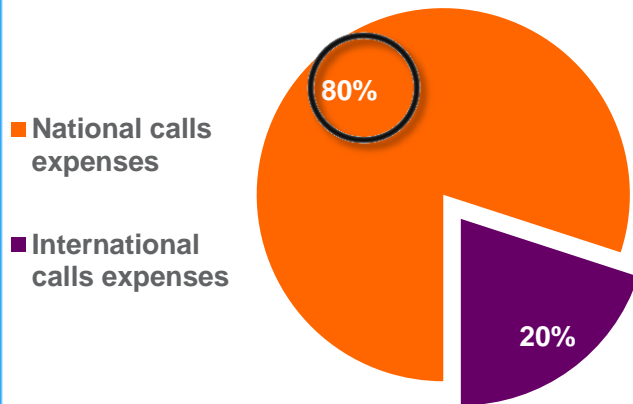
Base: All Companies who have mobile connections in their name 2011 (n=213) , 2007 (n=102)

B12. For mobiles owned in your company's name, please tell me which value added services does your company use on a regular basis?

# Mobile Expenditure

- National calls represent 80% of total mobile spend by businesses.
- Average monthly spend on mobile services has decreased since 2007 as competition intensifies between mobile services providers, with the greatest expenditure reduction experienced by large businesses.

Mobile Phone Expense (proportion for Inter/National Calls)



Base: All Respondents 2011 (n=250)

Average Monthly Mobile Spending	Total	Less than 20 Employees	20-99 Employees	100+ Employees
<i>Base-2011</i>	250	113	73	64
Average spend (BD)	298	142	242	586
<i>Base-2007</i>	159	66	65	28
Average spend (BD)	425	200	300	970

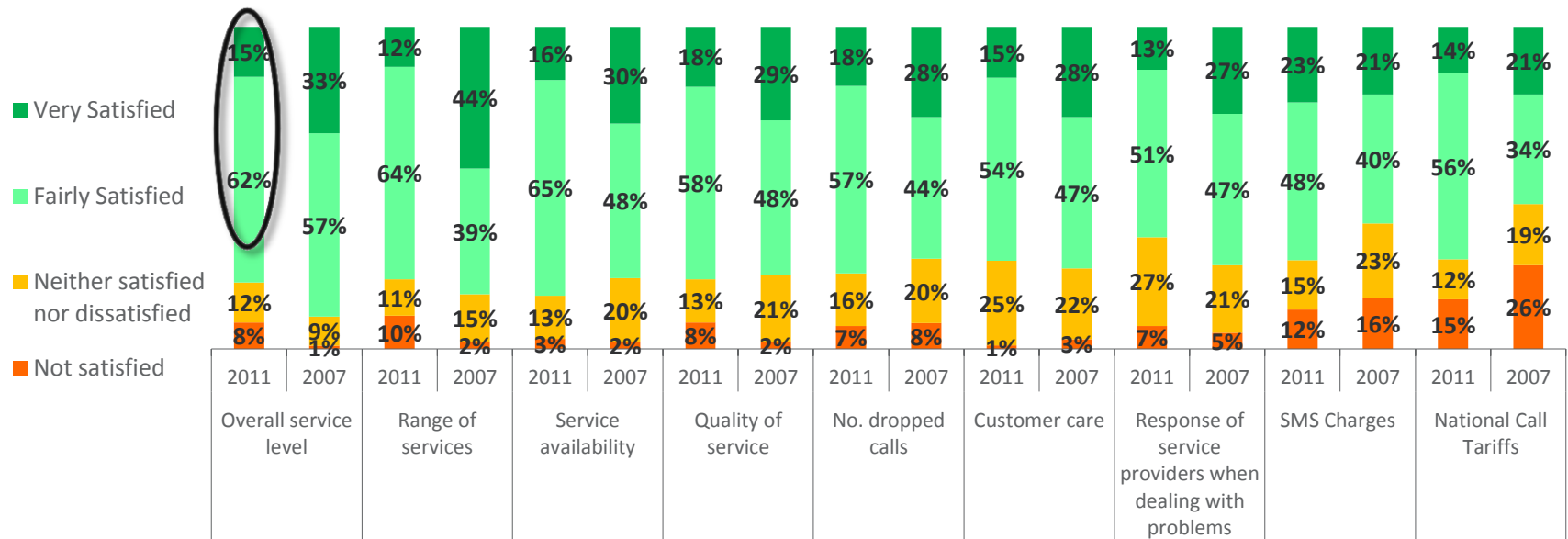
B14. What percentage of the total telecoms spend from mobile phones is on National and International Calls?

P4b. Could you please tell me what is your average monthly spend on Mobile?

# Satisfaction with Mobile Service

- Majority of businesses are satisfied with their overall level of mobile service, but satisfaction levels were lowest for customer care and operator response when dealing with problems.
  - However, satisfaction with overall mobile services has decreased since 2007 (77% of businesses were satisfied with the overall service level in 2011, compared with 90% in 2007).

Satisfaction with Mobile Service



Base: All companies who provide mobile phones to staff – 2011 (n=213), 2007 (n=102)

B24. How satisfied are you with the following elements of your mobile service?

# Summary of Mobile Phone Service

- The proportion of businesses who provide mobile phones to employees has increased by more than 30% since 2007, with all large businesses providing mobiles to their staff.
- Mobile workforce is the main reason for using mobile phones (42%) closely followed by expenditure control (37%).
- The number and duration of national calls made from mobiles have increased since 2007, with more than 60% of businesses making more than 50 calls per day.
- Only 3% of businesses have ever switched their mobile service provider, primarily to reduce costs.
- More than 80% of businesses are unlikely to switch, primarily because of satisfaction with their current mobile service provider.
- Bulk SMS (44%) and International roaming (42%) are the main value added services used by businesses.
- National calls represent 80% of total mobile monthly spend. Average monthly expenditure on mobile services has decreased by almost 30% since 2007.
- The majority of businesses are satisfied with their overall level of mobile service, but satisfaction levels were lowest for customer care and dealing with problems.

### 3. Telecoms Services

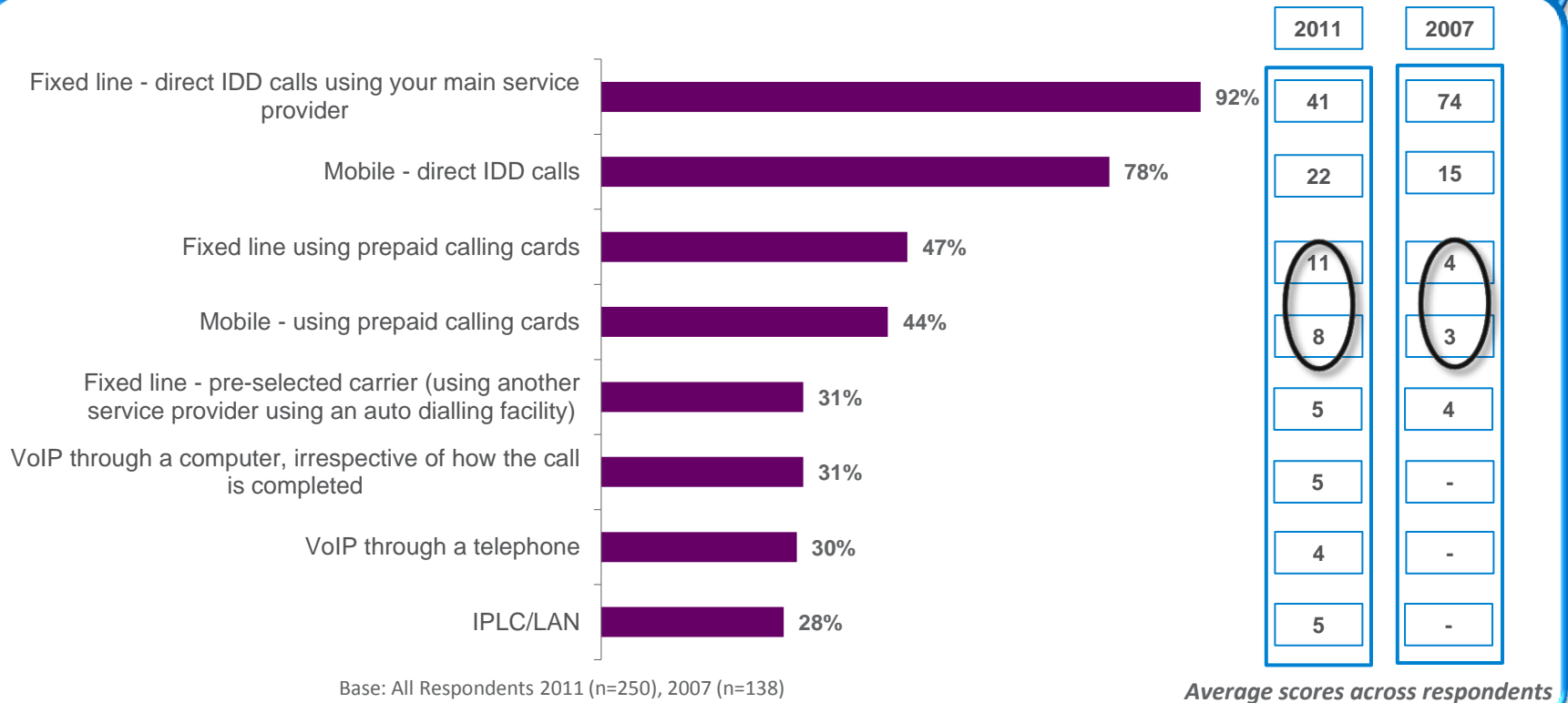
- a. Telecommunications Services for Businesses
- b. Fixed Line Service
- c. Mobile Line Service
- d. International Calls**
- e. Internet/Data Services



nielsen  
.....

# Options used to make International Calls

- Fixed line-Direct IDD (92% of businesses) & Mobile – Direct IDD (78% of businesses) are extensively used to make international calls, followed by Fixed line-using Prepaid cards (47%) & Mobile-using Prepaid cards (44%).
- 63% of international calls were made by either Fixed line-Direct IDD or Mobile – Direct IDD.
- The proportion of international calls made by prepaid calling cards has increased significantly from 7% in 2007 to 19% in 2011.

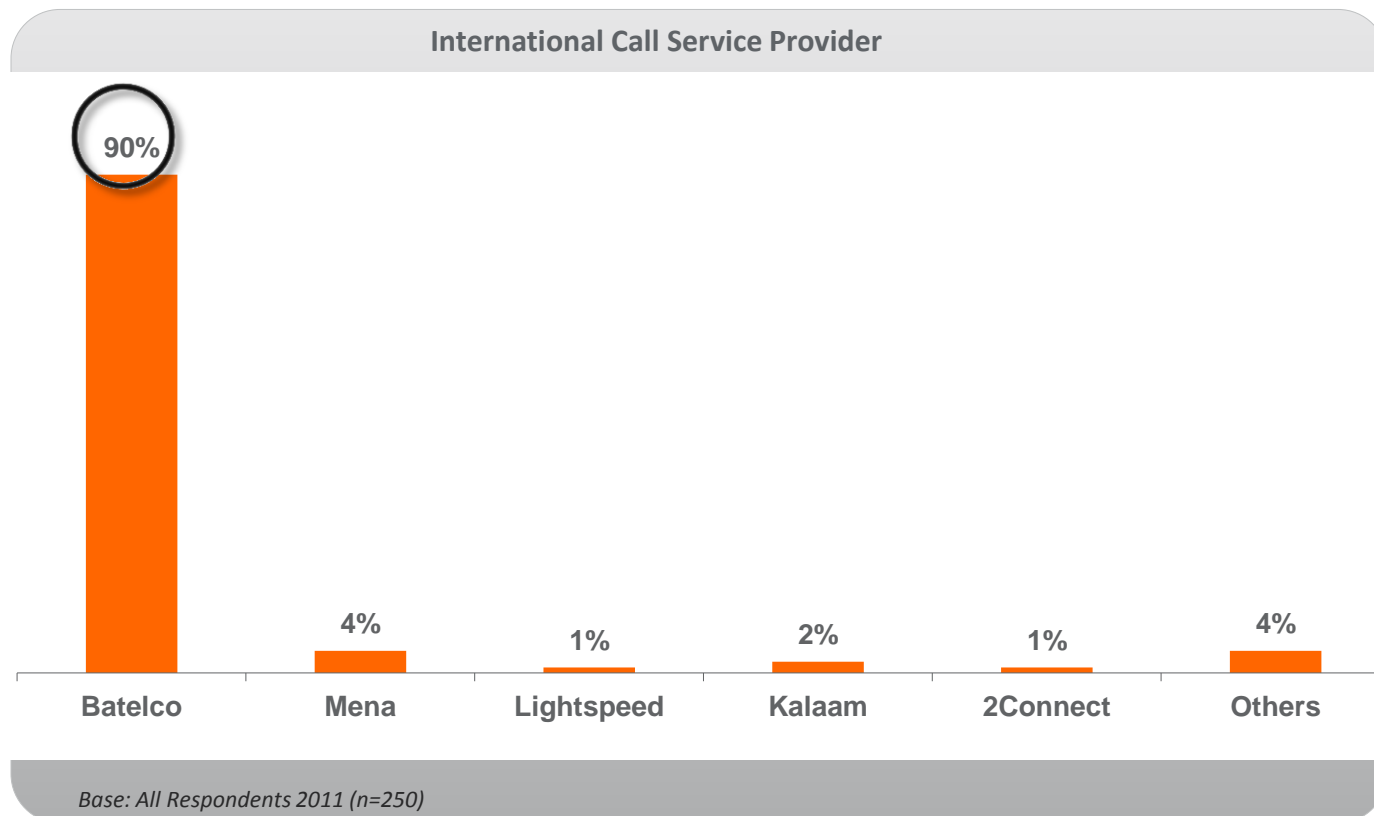


B6a. Which of these methods does your company use to make international calls?

B6b. Thinking about the international calling methods you mentioned, please indicate the proportion of calls made through each of these?

# International Call Service Provider

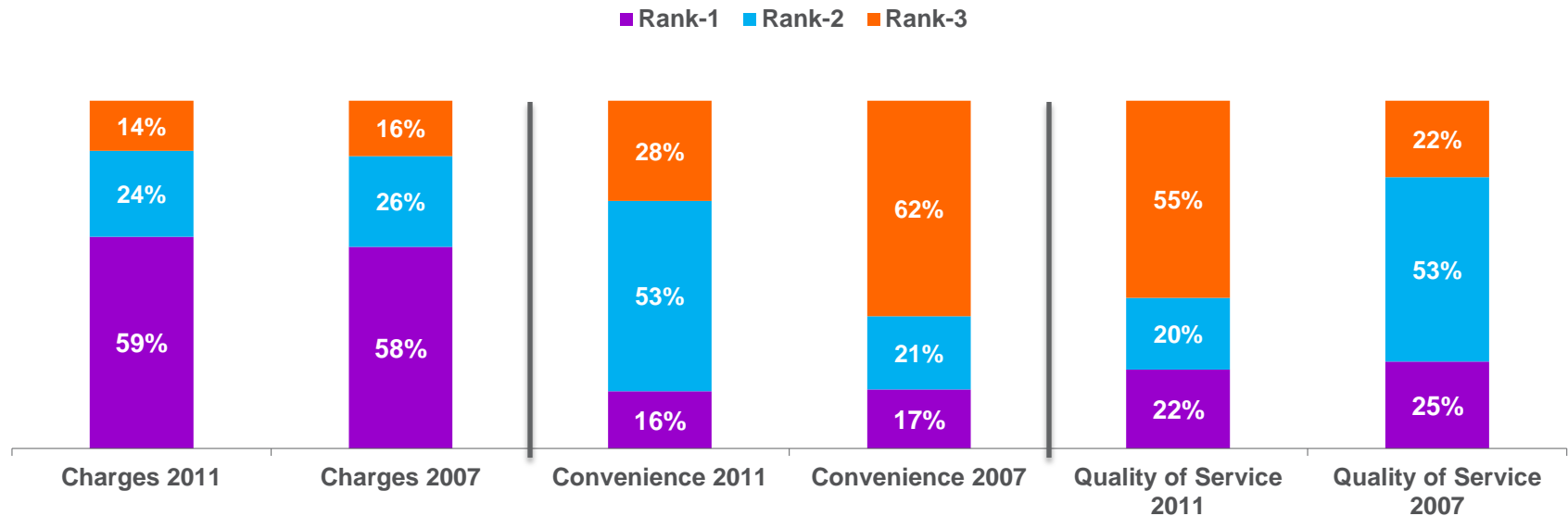
- Batelco is used by the majority of businesses (90%) for making International calls.



B20. Now tell me which of the following operators provide originating (outbound) international direct dial call services to your office / site?

# Important Factors for making International Calls

- The most important factor for choosing how to make international calls has not changed since 2007.
  - 59% of businesses ranked charges as the most important factor when choosing the method for making international calls.



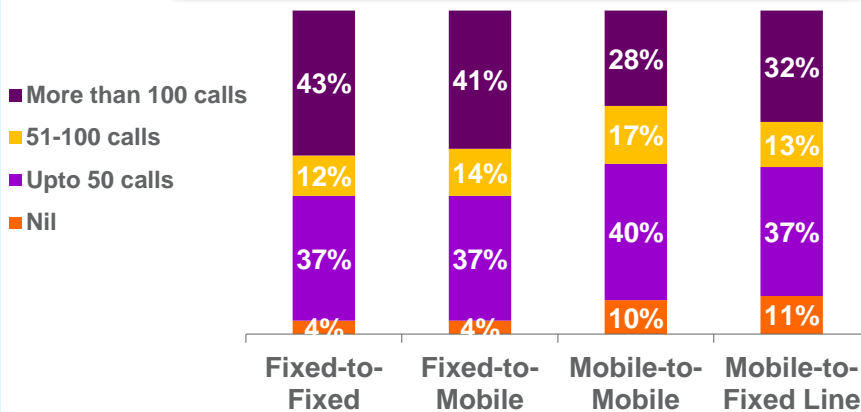
Base: Total 2011 (250), 2007 (n=138)

B19. Please see this card. This card has some factors which are important while making international calls. Please rank them as per their importance to your company when it comes to making international calls?

# Number and Duration of International Calls made

- More than 40% of businesses make more than 50+ international calls per day.
- Most of international calls are made from fixed lines.
- Number of international calls has increased significantly (by more than 150%) since 2007.
- The duration of calls has also increased, with the majority of international calls (66%) lasting for more than 3 minutes.

Number of International Calls

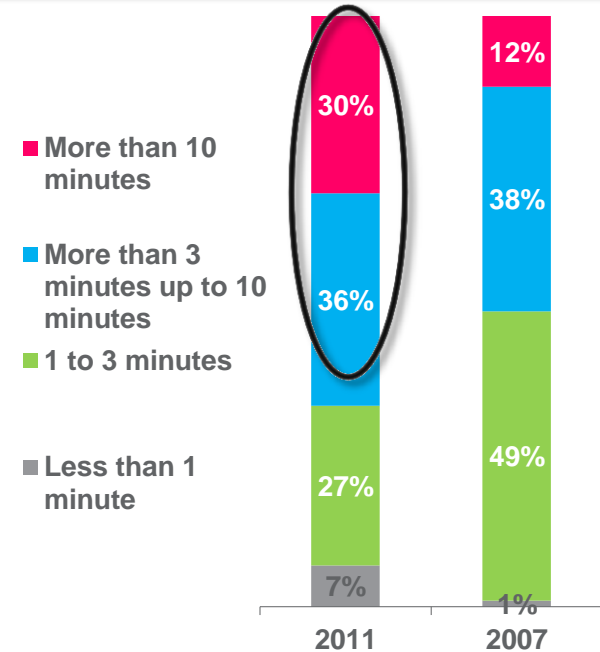


Average number of international calls made daily

	Fixed to Fixed	Fixed to Mobile	Mobile to Mobile	Mobile to Fixed
2011	124	124	91	104
2007	37	37	34	34

Base: Total 2011 (250), 2007 (n=138)

Duration of International Calls

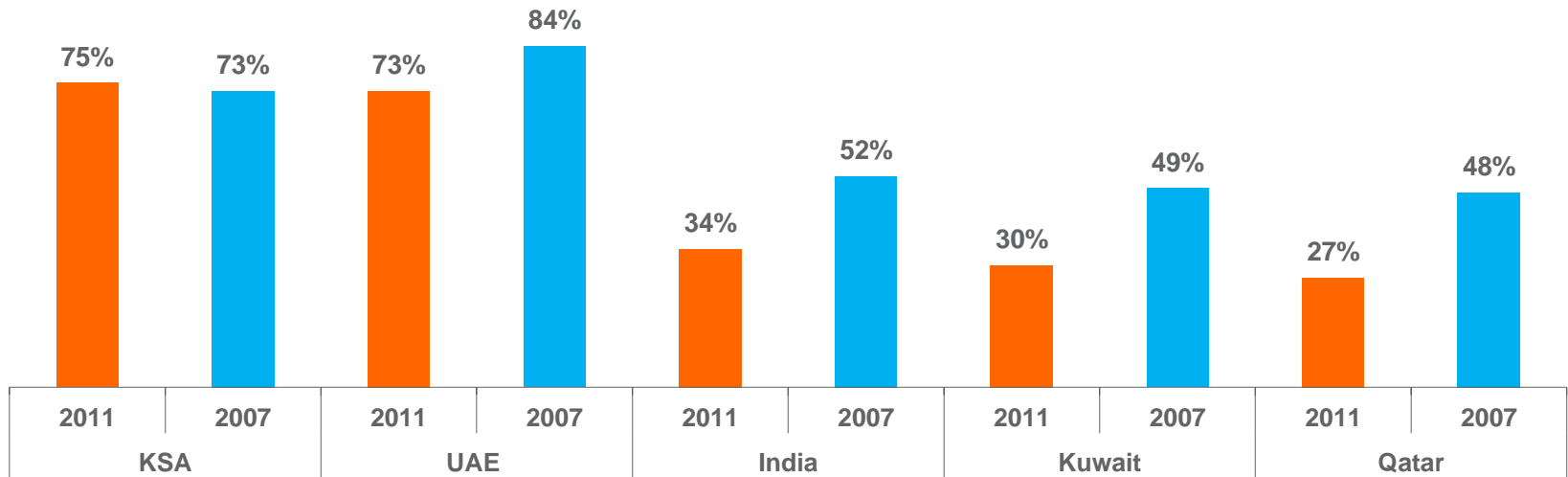


B16. Now I would like to know the number of international calls made through fixed line and mobile?  
B21. Could you please tell me what proportion of the international calls will fall under these durations?

# Destinations of International Calls

- KSA (75%) followed by UAE (73%) are the most common called countries since 2007.
  - However, the proportion of businesses calling UAE has decreased from 84% in 2007 to 73% in 2011.

Top 5 Countries Called



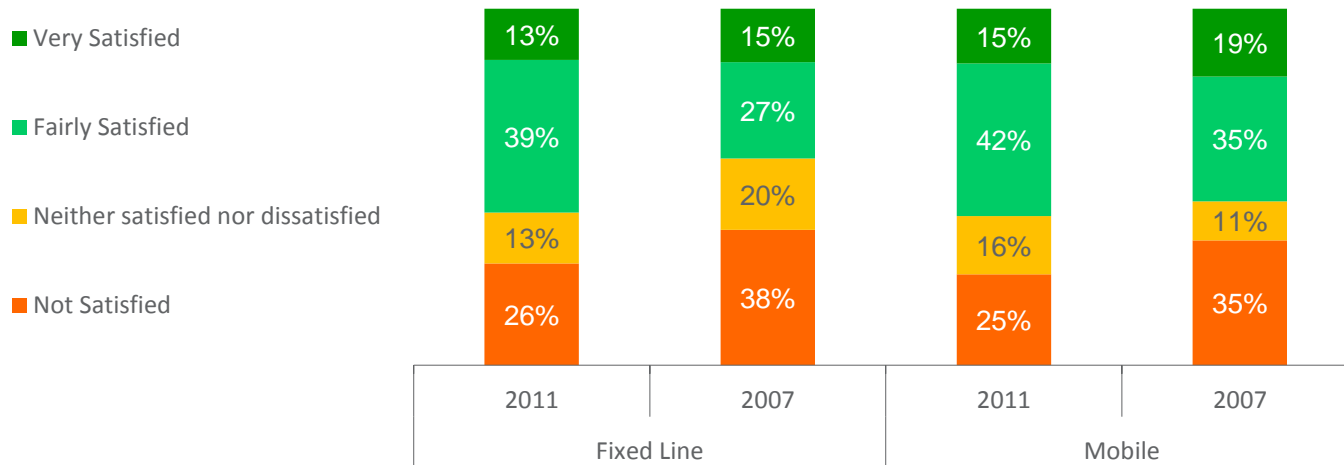
Base: All Respondents 2011 (250), 2007 (138)

B22. Could you please tell me which countries do you call regularly?

# Satisfaction with International Call Charges

- Satisfaction with international calls charges has improved since 2007. More than 50% of businesses are satisfied with international calls charges

Satisfaction Level – International Call Charges



Base: All Respondents 2011 (n=250)

B23. How satisfied are you with the following elements of your fixed line service?

B24. How satisfied are you with the following elements of your mobile service?

# Summary of International Calls

- Fixed line-Direct IDD (92% of businesses) & Mobile – Direct IDD (78% of businesses) are extensively used to make international calls. Prepaid calling cards have become increasingly important, accounting for just under 20% of international calls made by businesses in 2011.
- 90% of businesses used Batelco for making international calls.
- Price is the most important consideration when making international calls, with 59% of businesses ranking charges as the most important factor when choosing the method for making international calls.
- More than 40% of businesses make 50+ international calls per day, with most calls made from fixed lines.
- KSA (75%) followed by UAE (73%) are the most commonly called countries.
- Satisfaction with international calls charges has improved since 2007. More than 50% of businesses are satisfied with the price they pay for international calls.

### 3. Telecoms Services

- a. Telecommunications Services for Businesses
- b. Fixed Line Service
- c. Mobile Line Service
- d. International Calls
- e. Internet/Data Services**

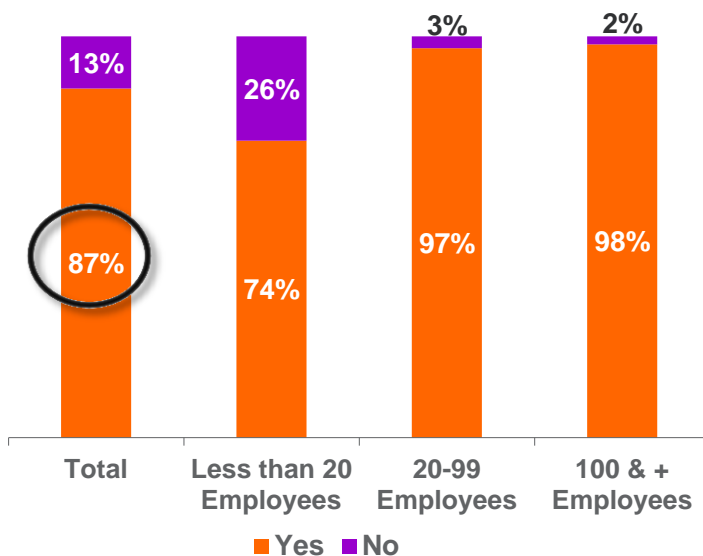


nielsen  
.....

# Access to Internet

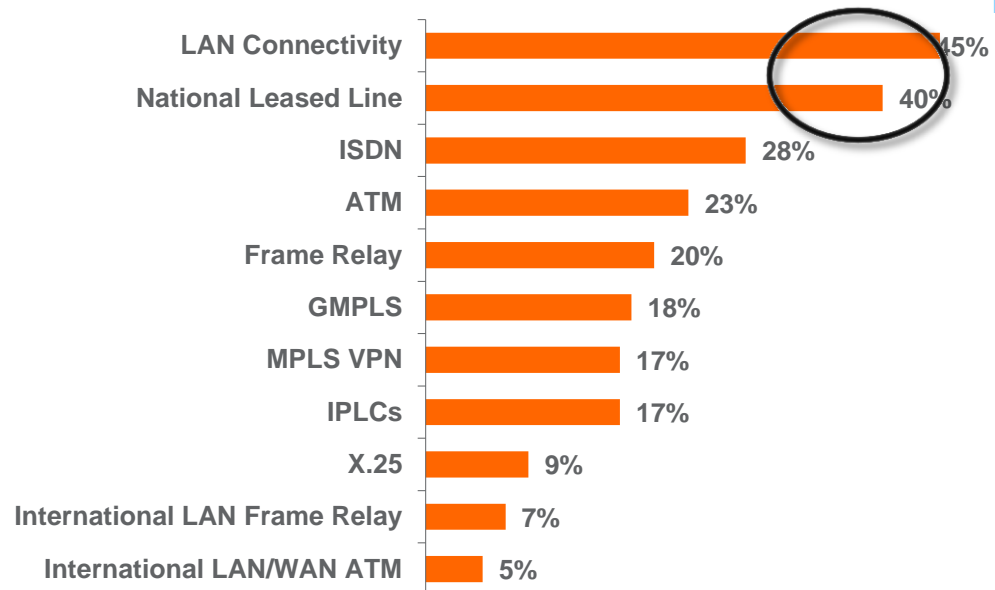
- Internet is essential for the exchange of information in today's business environment.
  - 87% of businesses have internet access in their offices.
  - Almost all medium and large businesses have internet access.
- National data services are important to businesses with 45% of businesses having a LAN connection and 40% of businesses having a national leased line service.

Internet Access In Office



Base: All Respondents 2011(n=250), less than 20 employees (n=113), 20-99 employees (n=73), 100 + employees (n=64)

Internet Connection Type



Base: All Respondents 2011(n=250)

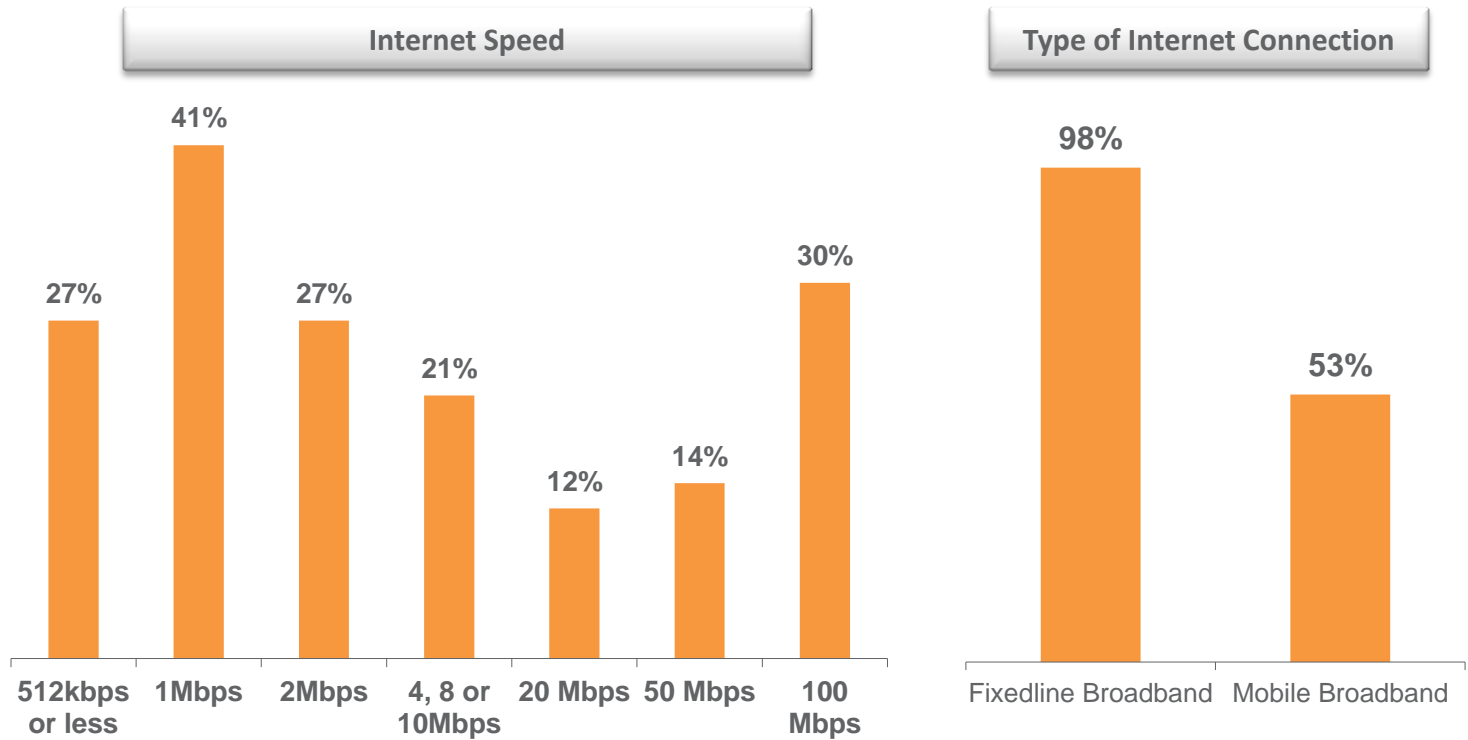
Q2a. Do you have internet access in your office?

C4. Please specify which data services your company subscribes to?

# Broadband Connections

- Of those businesses with internet access, 98% use fixed line Broadband while 53% use Mobile Broadband.
- 41% of businesses with internet access subscribe to a broadband service with a speed of 1Mbps, followed by 30% of businesses with a 100Mbps service.

Base: All  
Respondents who  
have access to net  
2011 (n=218), 2007  
(n=102)



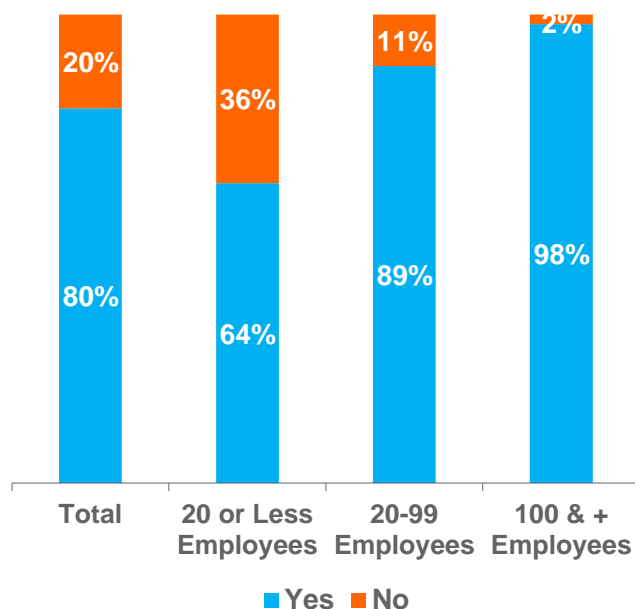
Q6. Which of these type of internet access services do you use at your office?

Q8a. How many individual broadband connections to the internet do you subscribe currently?

# Web Presence

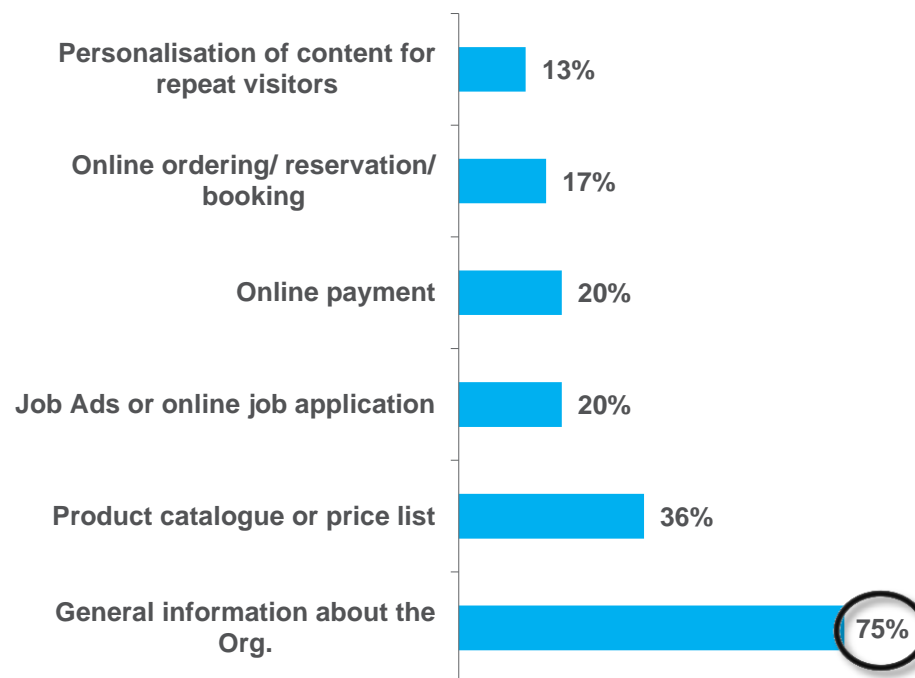
- The majority of businesses have a web presence, with 98% of large businesses and 89% of medium businesses having a website.
- Providing general information about the organization is the most common facility offered on the website (75%).

Business's Web Presence



Base: Total (n= 250), 20 or Less employees (n=113), 20-90 employees (n=73), 100 + employees (n=64)

Facilities Offered By Organization's Website

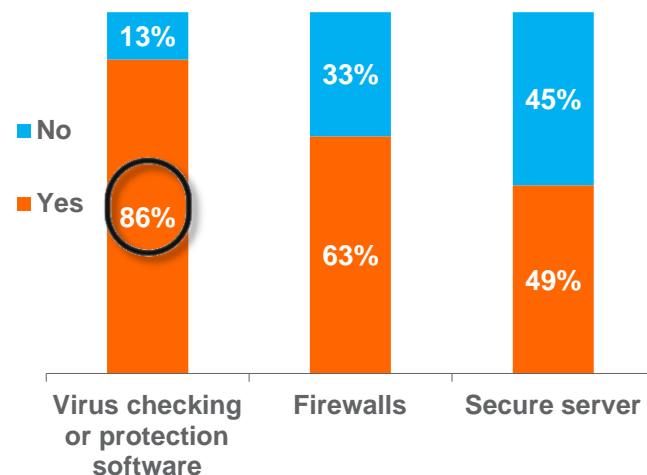


Base: Those who has website Presence (n=200)

Q9a. Please tell us if your business has any kind of web presence. That includes a website, homepage or presence on another entity's website....?  
Q10a. Please indicate which of the following facilities is offered by your organisation's website?

- Internet security is an important consideration for businesses.
  - 86% of businesses have “Virus Checking and Protection Software”, 63% of businesses use Firewalls, and only 49% have secured servers.
  - Large businesses are very concerned with internet security as they deal with large volume of data.

## Internet Security Facilities



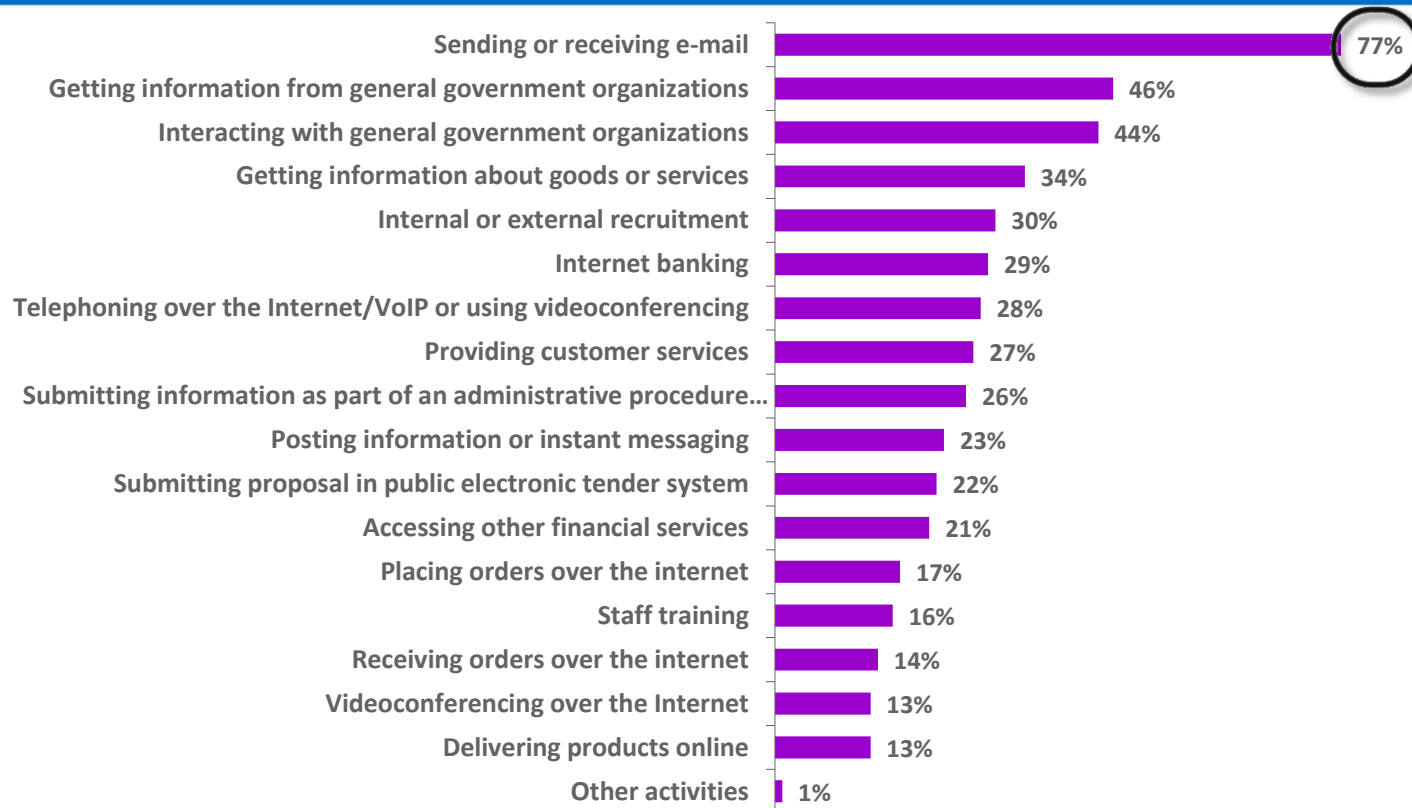
Base: All Respondents 2011 (n=250)

	Less than 20 Employees	20-99 Employees	100+ Employees
<i>Base</i>	<i>113</i>	<i>73</i>	<i>64</i>
Virus Checking or Protection software	73%	97%	97%
Firewall	58%	64%	70%
Secure Server	40%	55%	58%

Q3. Which of these internet safety facilities are being used in your company?

# Internet Activities

- The most common uses of internet are sending and receiving emails (77% of businesses), sourcing information from government organizations (46%), and interacting with government organizations (44%).

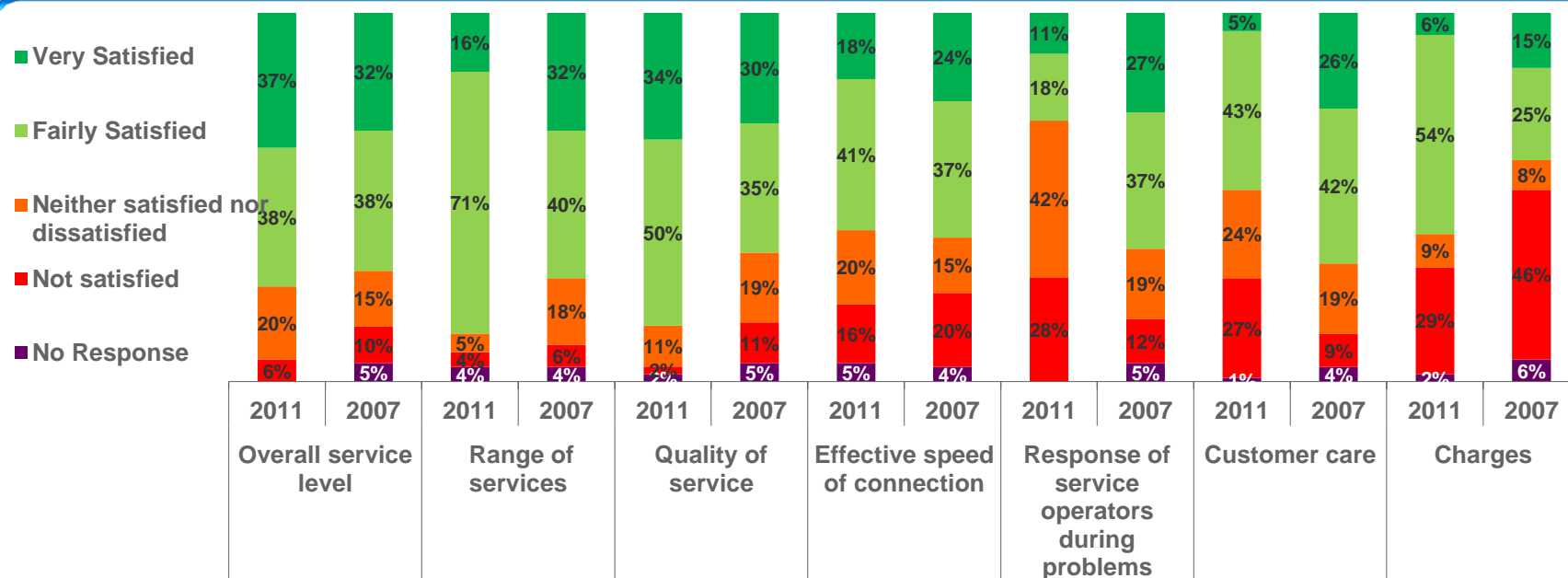


Base: All Respondents who have access to net 2011 (n=218)

Q5a. Please look at this card and tell us which of the following internet activities are undertaken in your organization?

# Satisfaction with Business Broadband Operator

- Satisfaction with internet services has improved in most areas, with 75% of businesses satisfied with overall service levels (up from 70% in 2007). However, satisfaction levels are very low for Response of Operator and Customer Care.
- “Discounted Price” is still the main suggestion proposed by business customers (66%).



Base: Those who have subscribed broadband to LAN/PDMS – 2011(n=125)

Suggestions for improvement of broadband service		
	2011	2007
	Discounts on Prices	66%
	Good Speed	7%
		25%

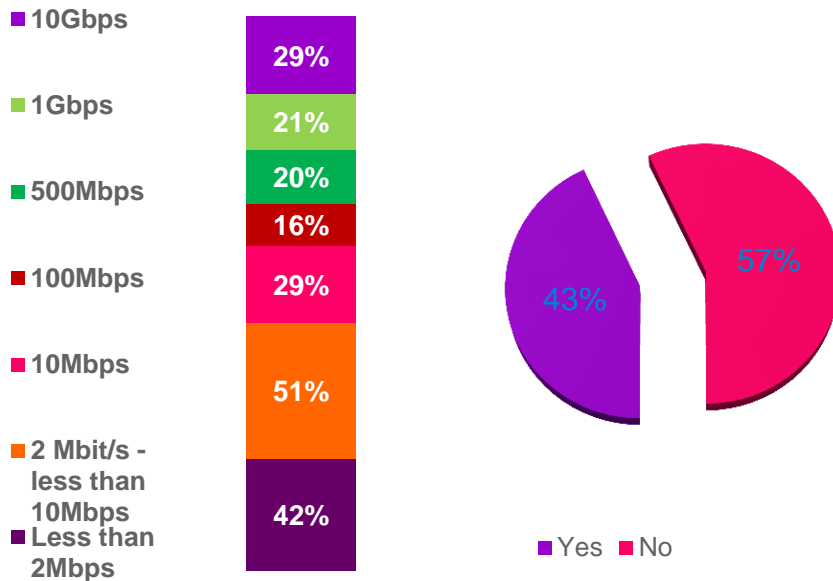
C7. How satisfied are you with your current business broadband operator for the following?

C8. Is there anything that you would like to see changed or improved for the broadband service?

# Subscription to National and International Data Services

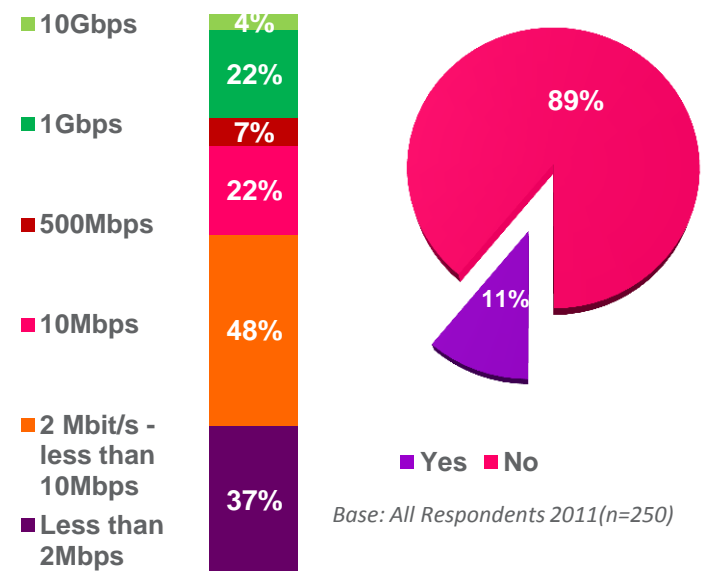
- 43% of businesses subscribed to other services such as national leased line, LAN connectivity services or MPLS VPN services.
- The majority of them are subscribed to less than 10Mbps

Subscription of National Data Services



- Only 11% of businesses subscribed to international data services such as international leased line, GMPLS, international LAN or international IP VPN.
- The majority of them are subscribed to less than 10Mbps

Subscription of International Data Services



C10. Do you purchase or have subscription of any of these? X.25, ATM, Frame Relay, national leased line services, LAN connectivity services, or MPLS VPN services?

C11a. You mentioned that you purchase or have subscription to at least ..... Can you please let me know the various speeds you have subscribed for these services. You can mention altogether by including all the various services?

C15. Do you purchase or have subscription of any of these services such as Int. leased line services, GMPLS, Int. Frame Relay, Int. LAN/WAN ATM or int. IP VPN ?

C16a. You mentioned that you purchase international .....how many circuits you have for these?

\* Low Base

# Summary of Internet/Data Services

- Internet is essential for the exchange of information in today's business environment, with almost all medium and large businesses having access to the internet.
- National data services are important to businesses with 45% of businesses having a LAN connection and 40% of businesses having a national leased line.
- The majority of businesses have a web presence, with 98% of large businesses and 89% of medium business having a website.
- Internet security is an important concern for businesses for the secure exchange of information. 86% of businesses use “Virus Checking and Protection Software” for internet security.
- Of those business accessing the internet, the majority (98%) use a fixed line broadband service, 41% subscribe to a broadband connection speed of 1Mbps and 53% have a mobile broadband subscription.
- Sending or receiving emails is the most common internet activity used by businesses.
- The majority of businesses are satisfied with internet services (i.e. overall services; range of services quality of services and charges). However, they are less satisfied with operator response and customer care.



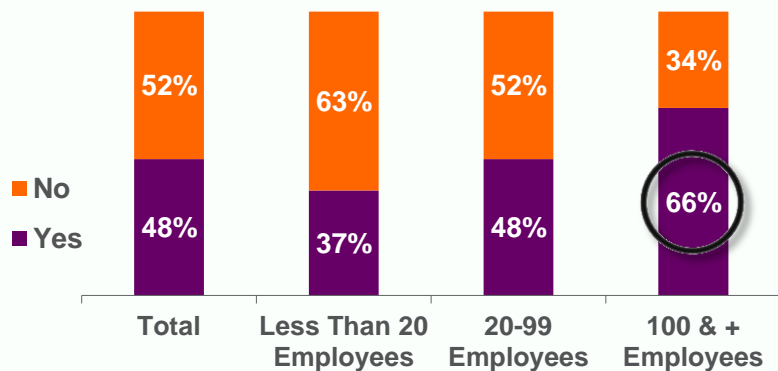
#### 4. Awareness of TRA

nielsen  
.....

# TRA - Awareness

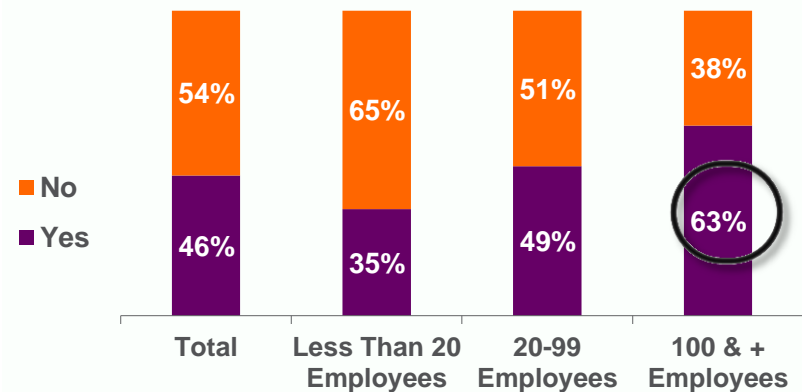
- Almost half of businesses are aware that Bahrain has a Telecoms Regulator, with a similar proportion aware of the Telecommunications Regulatory Authority (TRA).
- The awareness level is significantly higher among larger businesses.

Awareness of any Telecoms Regulator



Base: Total 2011(n=250), Less than 20 employees (n=113), 20-99 employees (n=73), 100 & + employees(64)

Ever Heard About Organization



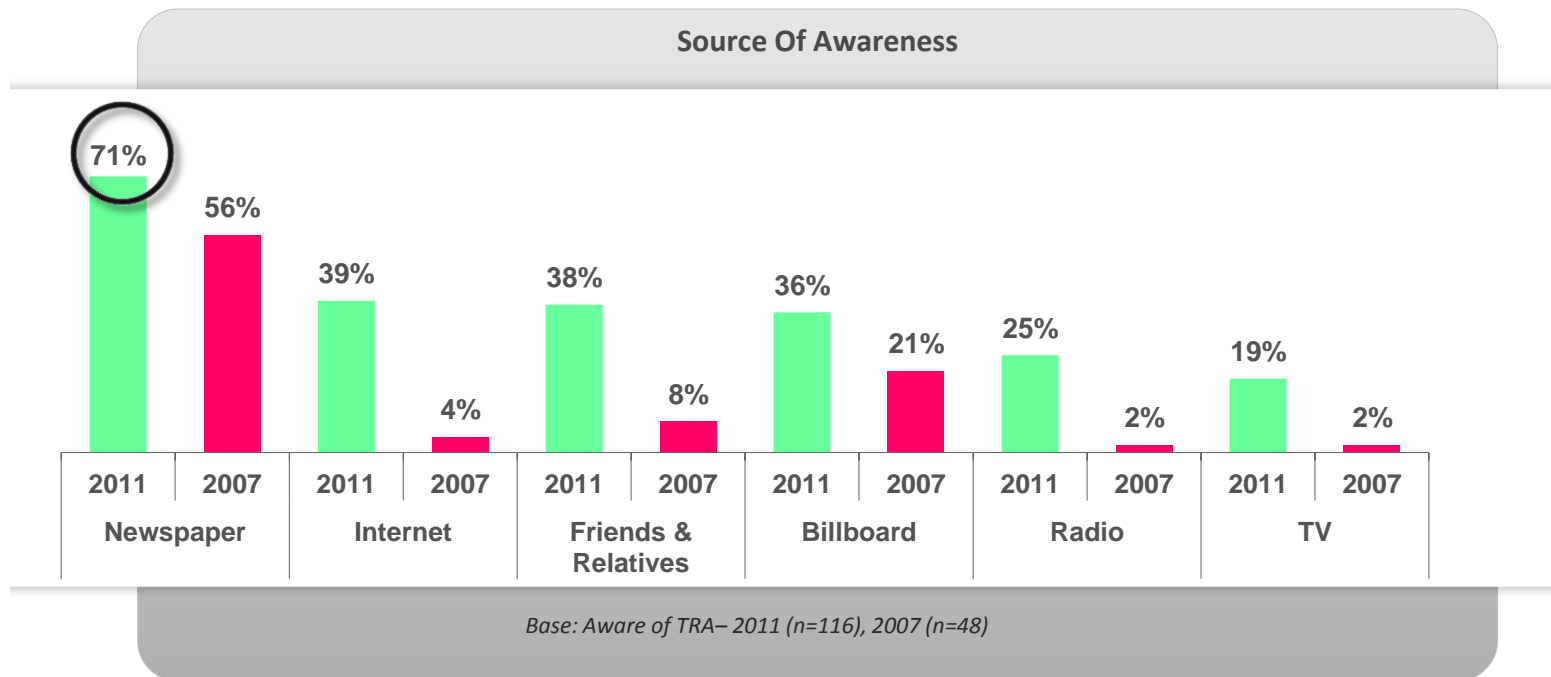
Base: Total 2011(n=250), Less than 20 employees (n=113), 20-99 employees (n=73), 100 & + employees(64)

QT0. Have you ever heard about any telecoms regulator in Bahrain?

QT5. SHOW LOGO CARD Now tell me have you heard of this organization before?

# Source of Awareness

- The main source of awareness of TRA is still through newspapers (71%).



QT5. SHOW LOGO CARD Now tell me have you heard of this organization before?

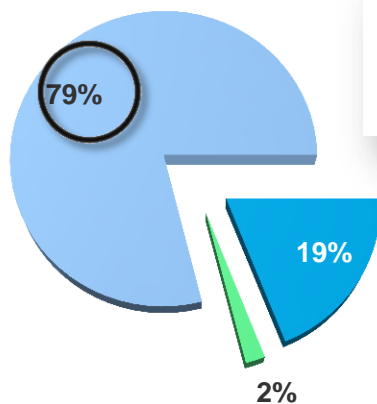
QT6. Could you please tell me through which source have you heard of Telecommunications Regulatory Authority (TRA)?

# TRA's Logo Awareness

- TRA's new Logo was recognized by 21% of businesses (compared with 30% in 2007).
- Only 2% of businesses correctly identified the logo as belonging to TRA.

2011

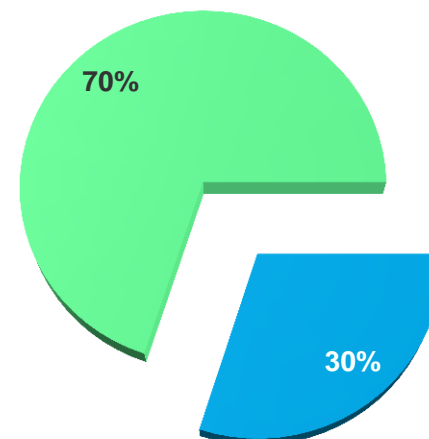
- Have seen this logo but Not TRA's logo
- Correctly specified it as TRA's logo
- Have not Seen this logo



Base: Total– 2011 (n=250), 2007 (n=159)

2007

- Yes
- No



Base: Total– 2011 (n=250), 2007 (n=159)

QT1. Please see this card and tell me whether you recall seeing this logo?

QT2. You've said that you have seen this logo; could you please tell me which organization has made this logo?

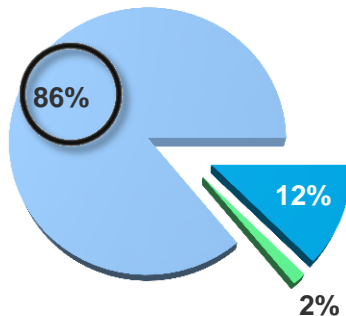
BASE FOR QT2 IS VERY LOW TO BE REPORTED IN CHART.

# Awareness of TRA's Advertisement

- Only 14% of businesses have seen the advertisement.
- Only 2% of businesses have correctly identified the advertisement as being TRA.

## Advertisement Awareness

- Have seen this logo but Not TRA's logo
- Correctly specified it as TRA's logo
- Have not Seen this logo



Base: Total– 2011 (n=250), 2007 (n=159)

## Advertisement Shown



QT1. Please see this card and tell me whether you recall seeing this logo?

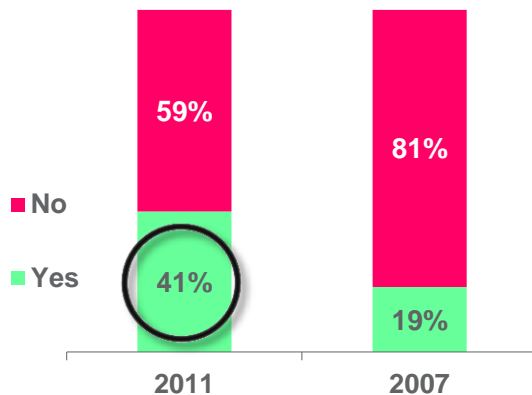
QT2. You've said that you have seen this logo; could you please tell me which organization has made this logo?

BASE FOR QT2 IS VERY LOW TO BE REPORTED IN CHART.

# TRA – Website

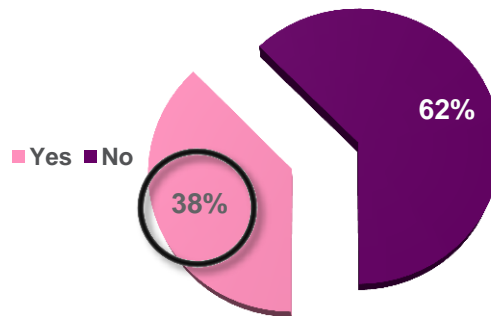
- The level of awareness of the TRA Website has increased from 19% in 2007 to 41% in 2011.
- Of those businesses who had heard about TRA's website, 38% had visited the website. Most of those found the website to be easy to navigate and contains useful and relevant information.

Heard about Website



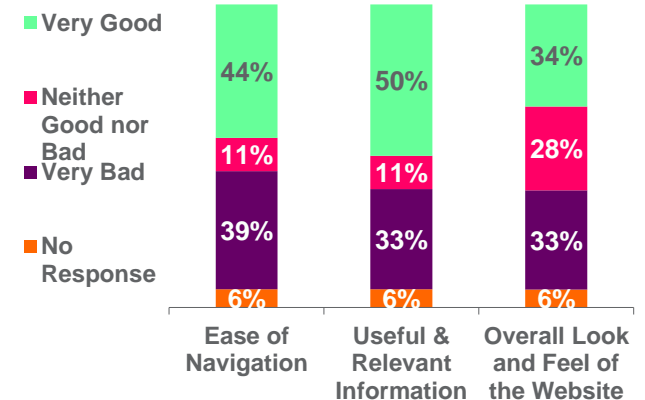
Base: Aware of TRA– 2011 (n=116), 2007 (n=48)

Ever visited Website (2011)



Base: Aware of Website– 2011 (n=48)

Experience of visiting Website



Base: Those aware of TRA Website 2011(n=18)\*

QT8a. Have you heard of Telecommunications Regulatory Authority 's website?

QT8b. Have you ever visited Telecommunications Regulatory Authority's website?

QT8c. How would you describe your experience of visiting the TRA website on a 5 point scale, 5 being very good and 1 being very bad.

\* Low Base

- The main roles of TRA that were recalled by businesses were to reduce the cost of telecoms services (35%) followed by to manage telecoms services (31%).

## Response on the role of TRA-2011

Reduce the cost	35%
Manage the telecoms service	31%
Authorization of telecoms service	6%
Take decisions of telecoms service	2%
Don't know much about it	13%
Don't know	13%

## Response on the role of TRA-2007

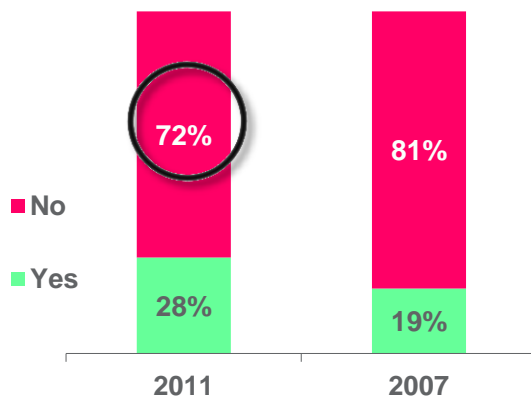
To control service / telecoms / communication	35%
Regulate rules of a telecoms companies	31%
It control charges	6%
They take care of our complaints	2%
Don't know much about it	16%
Don't know	17%

Base: Aware of TRA— 2011 (n=116), 2007(n=48)

QT7. And what do you think is the role of Telecommunications Regulatory Authority (TRA)?

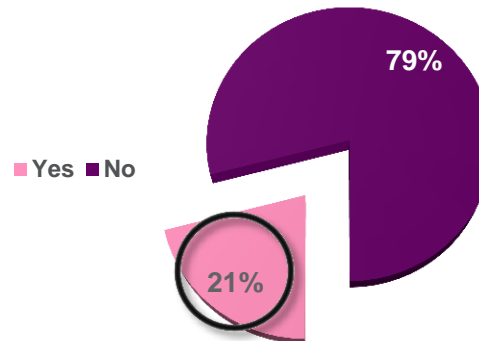
- 28% of businesses who have heard of TRA are aware that TRA consults with the public on regulatory issues. This proportion has increased from 19% in 2007.
- Of those businesses who are aware of TRA's public consultation, 79% have not provided TRA with a submission, mainly because they were not interested in the topics.

**Awareness of TRA asking for comments on regulation issues**



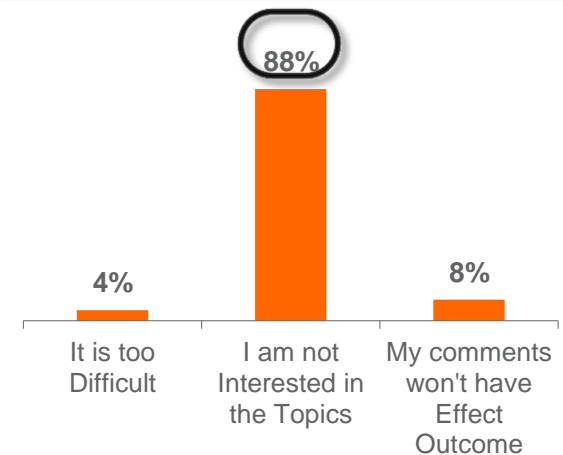
Base: Aware of TRA– 2011 (n=116), 2007 (n=48)

**Responses to Request For Submission/Consultation (2011)**



Base: Aware of Comments Asked– 2011 (n=33)

**Reasons For No Response**



Base: Never Respond to Request– 2011 (n=26\*)

QT9. Do you know that TRA asks for comments from public on issues related to regulations?

QT10. Have you ever responded to any request for submission / consultation?

QT11. You mentioned that you have never responded to a request for submission / consultation. Please tell me the reason for the same?

\* Low Base

# Summary of TRA Awareness & its Activities

- Almost half of businesses are aware of the Telecommunications Regulatory Authority (TRA), although there are relatively low levels of awareness among business of the TRA logo and its advertisement.
- Newspapers are the main source of TRA awareness.
- The level of awareness of TRA's Website has increased from 19% in 2007 to 41% in 2011.
- "Reduction of the Telecoms Services Cost" and "Telecoms Services Management" are the most common roles of TRA identified by businesses.
- The proportion of businesses who are aware of TRA's public consultation has increased slightly since 2007.

## 5. Conclusions



nielsen  
.....

## Fixed Line Services

- The average number of fixed national calls made by businesses has significantly increased compared with 2007.
- The average duration of national calls made from fixed lines has increased since 2007.
- For large & medium businesses, average monthly expenditure on fixed line services has decreased since 2007. However, the average monthly spend by small businesses has slightly increased, from BD200 in 2007 to BD220 in 2011.
- The majority of businesses are satisfied with their overall level of fixed line services.

## Mobile Phone Services

- The proportion of businesses that provide mobile phones to employees has increased by more than 30% since 2007, with all large businesses providing mobiles to their staff.
- The number and duration of national calls made from mobiles have increased since 2007, with more than 60% of businesses making more than 50 calls per day.
- Bulk SMS (44%) and International roaming (42%) are the main value added services used by businesses.
- Average monthly spend on mobile services has decreased since 2007 as competition intensifies between mobile services providers, with the greatest expenditure reduction experienced by large businesses.
- The majority of businesses are satisfied with their overall level of mobile service, but satisfaction levels were lowest for customer care and dealing with problems.

## International Calls

- Prepaid calling cards have become increasingly important, accounting for just under 20% of international calls made by businesses in 2011.
- More than 40% of businesses make 50+ international calls per day, with most calls made from fixed lines.
- KSA (75%) followed by UAE (73%) are the most commonly called countries.
- Satisfaction with international calls charges has improved since 2007. More than 50% of businesses are satisfied with the price they pay for international calls.

## Internet and Data services

- Internet is essential for the exchange of information in today's business environment, with almost all medium and large businesses having access to the internet.
- Of those businesses accessing the internet, the majority (98%) use a fixed line broadband service, and 41% subscribe to a broadband connection speed of 1Mbps.
- Sending or receiving emails is the most common internet activity used by businesses.
- Satisfaction with internet services has improved in most areas, with 75% of businesses satisfied with overall service levels (up from 70% in 2007).

## TRA Awareness

- Almost half of businesses are aware of the Telecommunications Regulatory Authority (TRA), although there are relatively low levels of awareness among business of the TRA's logo and its advertisement.
- The level of awareness of TRA's Website has increased from 19% in 2007 to 41% in 2011.

## 6. Appendix – Research Methodology



nielsen  
.....

## Target Respondent

- Responsible for telecoms needs in the organization (Decision makers or Influencers).
- Following sectors were included in research:
  - Agriculture, hunting and forestry
  - Fishing
  - Mining and quarrying
  - Manufacturing
  - Electricity, gas and water supply
  - Construction
  - Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods
  - Hotels and restaurants
  - Transport, storage and communications
  - Financial intermediation
  - Real estate, renting and business activities
  - Public administration and defence; compulsory social security
  - Education
  - Health and social work
  - Other community, social and personal service activities
  - Extraterritorial organizations and bodies
  - Government organizations, ministries

## Research Methodology

- **250 Quantitative face to face interviews** across various industries were conducted amongst the target respondents using a structured questionnaire.
- Interviews were conducted in English / Arabic as convenient to the respondent.
- Interview length was approximately of 25-30 minutes.
- Field work timing: Sep/Oct 2011.

# Sample Profile – Industry-wise

NUMBER OF EMPLOYEES	SAMPLE SIZE 2011	SAMPLE SIZE 2007
Wholesale & Retail	85	25
Construction	37	23
Manufacturing	32	21
Real Estate	21	
Govt. Org.	19	
Other (Social & Personal Services)	15	
Hotels and restaurants	13	32
Transport, IT & Communication	7	6
Fishing	6	
Financial intermediation	5	
Education	3	
Health and social work	2	5
Agriculture	1	
Utility	1	
Public Administration	1	
Extraterritorial organizations and bodies	1	
Financial, Insurance, Real estate & Business services		33
Business Services (Ad agencies / Consultants) etc		14
Others	1	
<b>TOTAL ESTABLISHMENTS</b>	<b>250</b>	<b>159</b>

# Respondent Profile – Company Size

NUMBER OF EMPLOYEES		SAMPLE SIZE 2011	SAMPLE SIZE 2007
Less than 20 Employees	Small Businesses	113	666
20-99 Employees	Medium Businesses	73	65
100 & More Employees	Large Businesses	64	28
<b>TOTAL ESTABLISHMENTS</b>		<b>250</b>	<b>159</b>

# Respondent Profile - Annual Turnover

Mean scores in 000s	Total	Less than 20 Employees	20-99 Employees	100+ Employees
Base: Total	250	113	73	64
Less than BD 120,000	27	34	23	20
BD 120,000 - BD 240,000	21	24	25	13
BD 240,000 - BD 600,000	10	10	10	13
BD 600,000 - BD 1,200,000	11	14	10	8
BD 1,200,000 - BD 3,000,000	11	9	15	9
More than BD 3,000,000	13	4	12	31
Mean (BD)	881,234	560,000	928,261	1,394,667