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2015 TELECOMMUNICATIONS MARKET SURVEY REPORT

BUSINESS RESULTS

24 APRIL 2016



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- 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.

TABLE OF CONTENTS

1. Introduction

- | | |
|------------------------|---|
| a. Research Background | 5 |
| b. Research Objectives | 6 |

2. Key Research Findings

7

3. Telecommunication Services

- | | |
|----------------------------------------------|----|
| a. Telecommunication services for businesses | 13 |
| b. Fixed Line Service | 18 |
| c. Mobile Phone Service | 29 |
| d. International Calls | 39 |
| e. Internet Service | 46 |

5. Appendix

57

INTRODUCTION

- ❑ Research Background
- ❑ Research Objectives

RESEARCH BACKGROUND

- The Telecommunications Regulatory Authority of Bahrain (TRA) was formed in October 2002. TRA is an independent body which has a direct responsibility to ensure effective liberalization of the telecommunications market.
- During 2015, TRA has commissioned Nielsen to conduct a telecommunication market survey with the objective of better understand the demand for telecommunications services in Bahrain. This includes usage of and access to telecom services across various users. It also outlines numerous areas of progress in the telecommunications sector in Bahrain.
- The telecom users are divided into two broad segments (Residential and Business), thus two separate modules were conducted to collect the required information.
- This report presents the results of business survey which was based on 253 face to face interviews conducted during June and July 2015.
- TRA also conducted a similar survey in 2007, 2011 and 2014. The results of these surveys can be found at: <http://www.tra.org.bh/en/media/consumer-and-business-surveys/>

RESEARCH OBJECTIVES

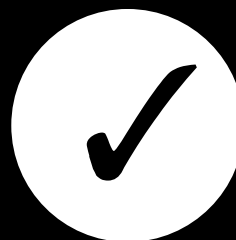
The key objectives of the 2015 survey are to understand the following



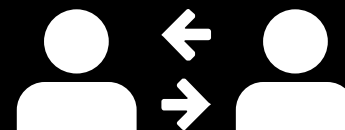
**ACCESS TO
TELECOM
SERVICES IN
BAHRAIN**



**USAGE OF
TELECOM
SERVICES IN
BAHRAIN**



**SATISFACTION
WITH VARIOUS
TELECOM
SERVICES**



**SWITCHING
BEHAVIOR**

Where appropriate the results of the 2015 survey have been compared with the results from previous years surveys to identify the key trends during this period

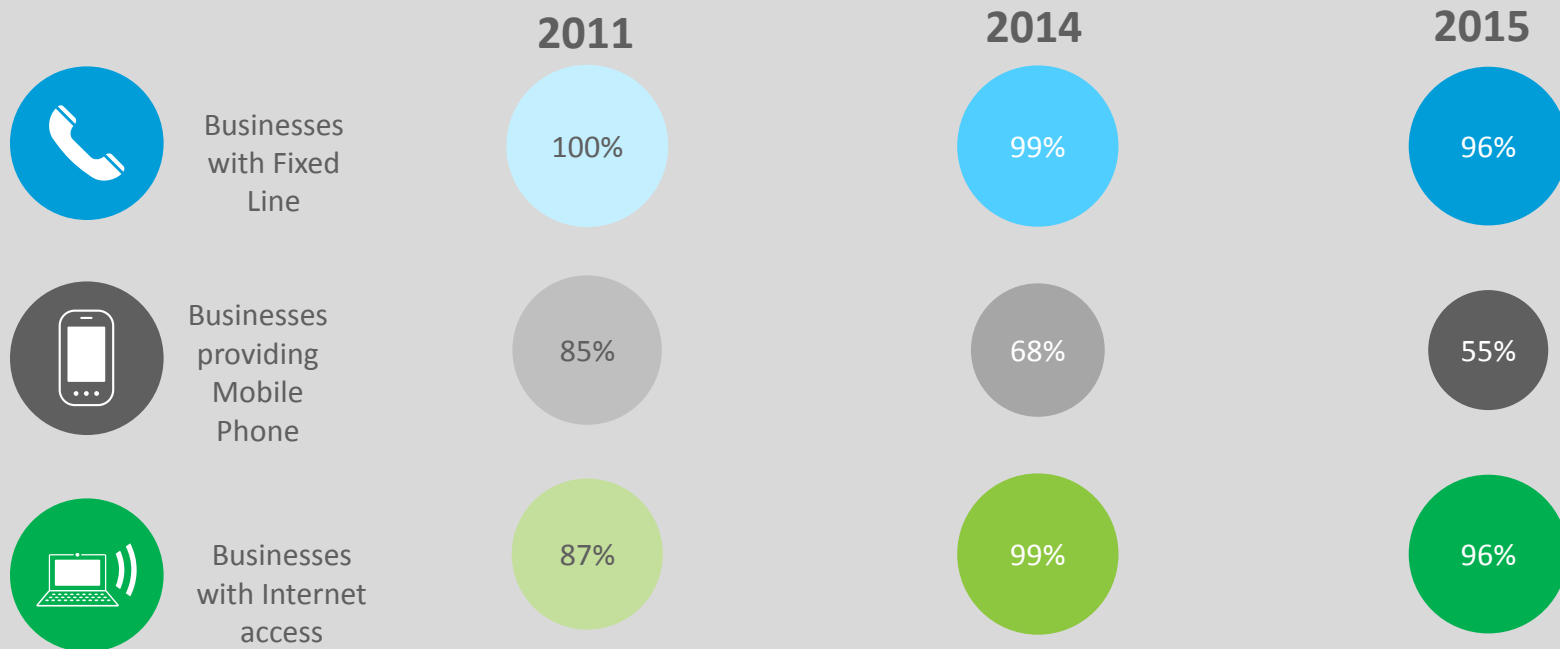
KEY SURVEY FINDINGS



ACCESS TO TELECOM SERVICES IN BAHRAIN

- **96%** of businesses have fixed line in 2015 compared with 99% in 2014.
- **55%** of businesses provide mobile phones to their staff in 2015 compared with **68%** in 2014.
- Access to internet by businesses has also slightly decreased with **96%** of businesses have access to internet in 2015 compared with 99% in 2014.

Access to Telecom services in Bahrain



Q11 Business has access to a fixed line telephone

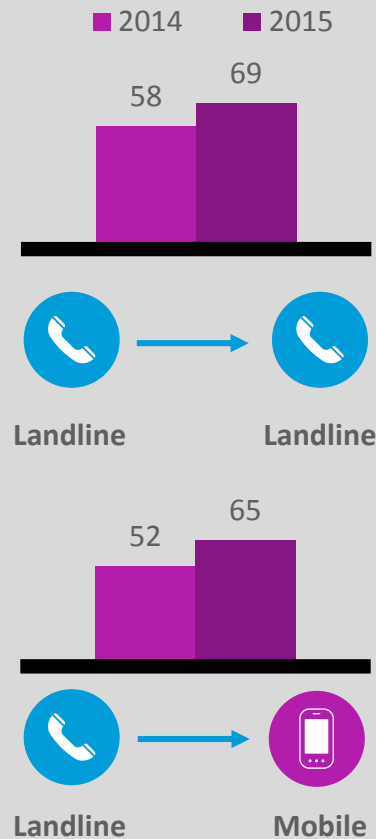
Q34 Does your organization provide mobile phones to staff?

Q61. Did your organization have an internet connection in the last 12 months?

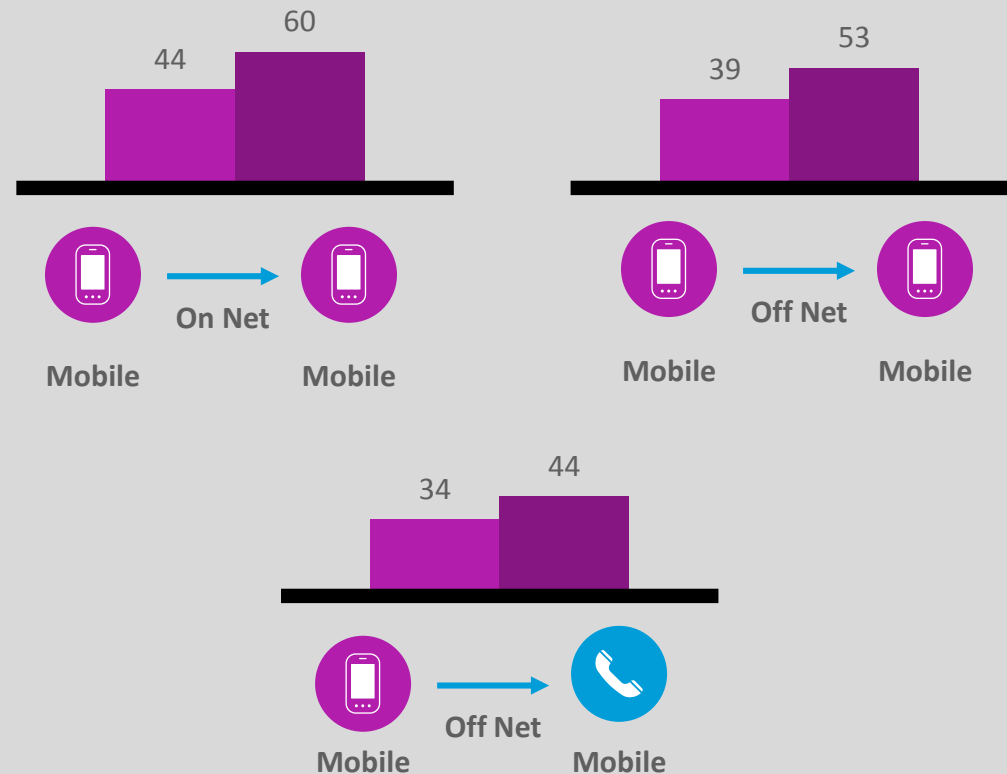
USAGE OF TELECOMS SERVICES IN BAHRAIN

- Usage of fixed line and mobile phone to make national calls by businesses have increased in 2015 compared with 2014 usage.

Average Number of National Calls From Fixed Line (on a daily basis)



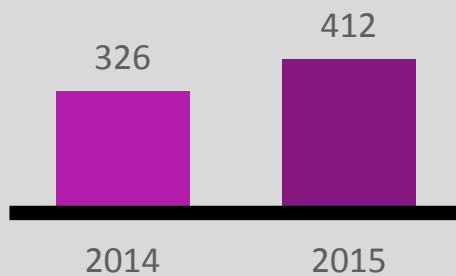
Average Number of National Calls From Mobile Phone (on a daily basis)



AVERAGE MONTHLY SPEND

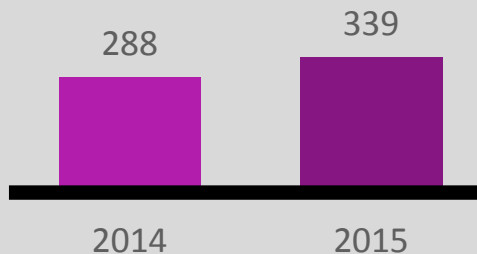
- With an increase in fixed line and mobile phone usage, the average monthly spend has increased in 2015 compared with 2014 monthly spend.
- Monthly spend on internet service has also witnessed a slight increase in 2015.

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



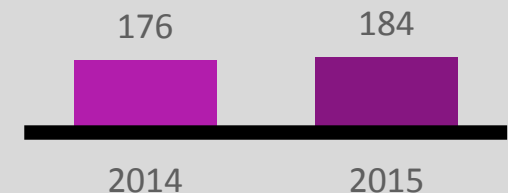
Base: 2015 (n=242), 2014 (n=250) 2011(n=250), 2007 (n=159)

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



Base: 2015 (n=138), 2014 (n=172) 2011(n=250), 2007(n=159)

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



Base: All Respondents 2014 (n=250) 2011(n=250), 2007(n=159)

Q29 Could you please tell me what is your average monthly spend on Fixed Line (including fax) on National Calls

Q47 On average, how much does your organization spend each month on mobile phone services (for mobile connections owned by the organization?)

Q80 On average, how much does your organization spend each month on internet Services?

INTERNET ACTIVITIES

- The main internet activities for businesses in 2015 are: sending or receiving e-mails , interacting with general government organizations, getting information from general government organizations, getting information about goods or services, internet banking and use of Instant messaging, bulletin boards.



89% Sending or receiving e-mail

73%

Getting information from
general governments

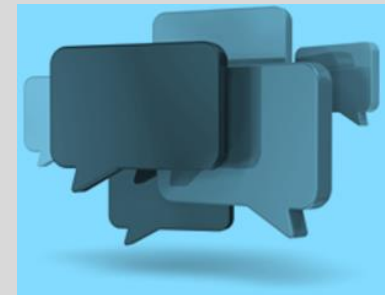


68% Internet Banking



74% Interacting with general
government

71% Getting information about
goods & services



67% Instant messaging

SATISFACTION WITH TELECOMS SERVICES

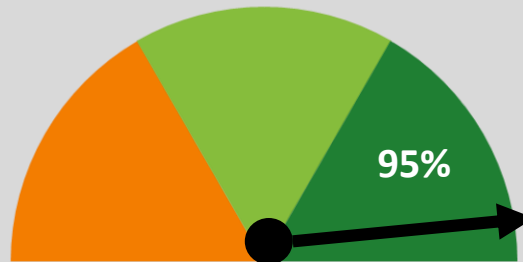
- The majority of businesses are satisfied with their telecommunications services with 98% of businesses are very or fairly satisfied with their fixed line services, 95% of businesses are very or fairly satisfied with their mobile services and 94% of businesses are very or fairly satisfied with their internet services.



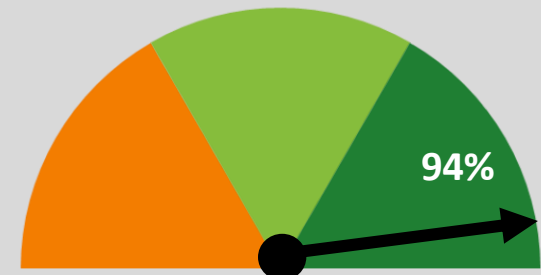
Overall Fixed Line Service



Overall Mobile Phone Service



Overall Internet Service



Q32 How satisfied are you with the following elements of your **fixed line service**?

Q49 How satisfied are you with the following elements of your **mobile service**?

Q81 How satisfied are you with the following elements of your **internet service**?

TELECOM SERVICES

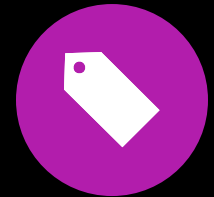
- ☐ **Telecommunication Services for Business**
- ☐ Fixed Line
- ☐ Mobile Phone Service
- ☐ International Calls
- ☐ Internet Service

SUMMARY OF TELECOM SERVICES



36% of businesses stated that telecommunication services were indispensable to their businesses.

Quality of services and Price are still basic factors drive the selection of drive selection of telecom service providers.



Bundling from one service provider is the preferred method of procuring telecom services. 1 in 4 stated that they conducted a tendering process to procure the telecom services, a significant rise from only 12% in 2014



On an average 179 employees regularly used a computer in last 12 months.

Wire based LAN and Intranet are the two top ICT technologies

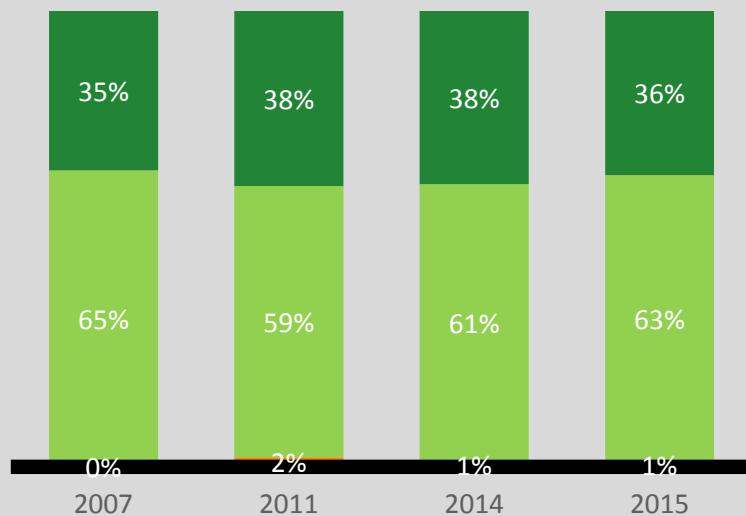


IMPORTANCE OF TELECOMMUNICATIONS SERVICES

- Telecommunications services are critical to running many businesses.
- The proportion of Medium and Large sized businesses who stated that telecommunication services is indispensable for their business operations has increased from 35% and 53% in 2014 to 43% and 59% respectively in 2015.

Importance of Telecommunications for Business

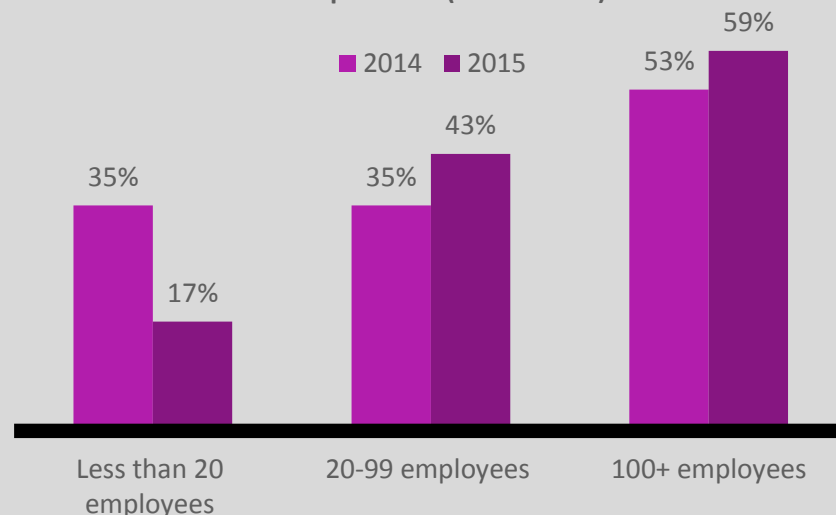
- Indispensable
- Important, Quite/very important
- Not very important



Base: 2015 (n=253), 2014 (n=252), 2011 (n=250), 2007 (n=159)

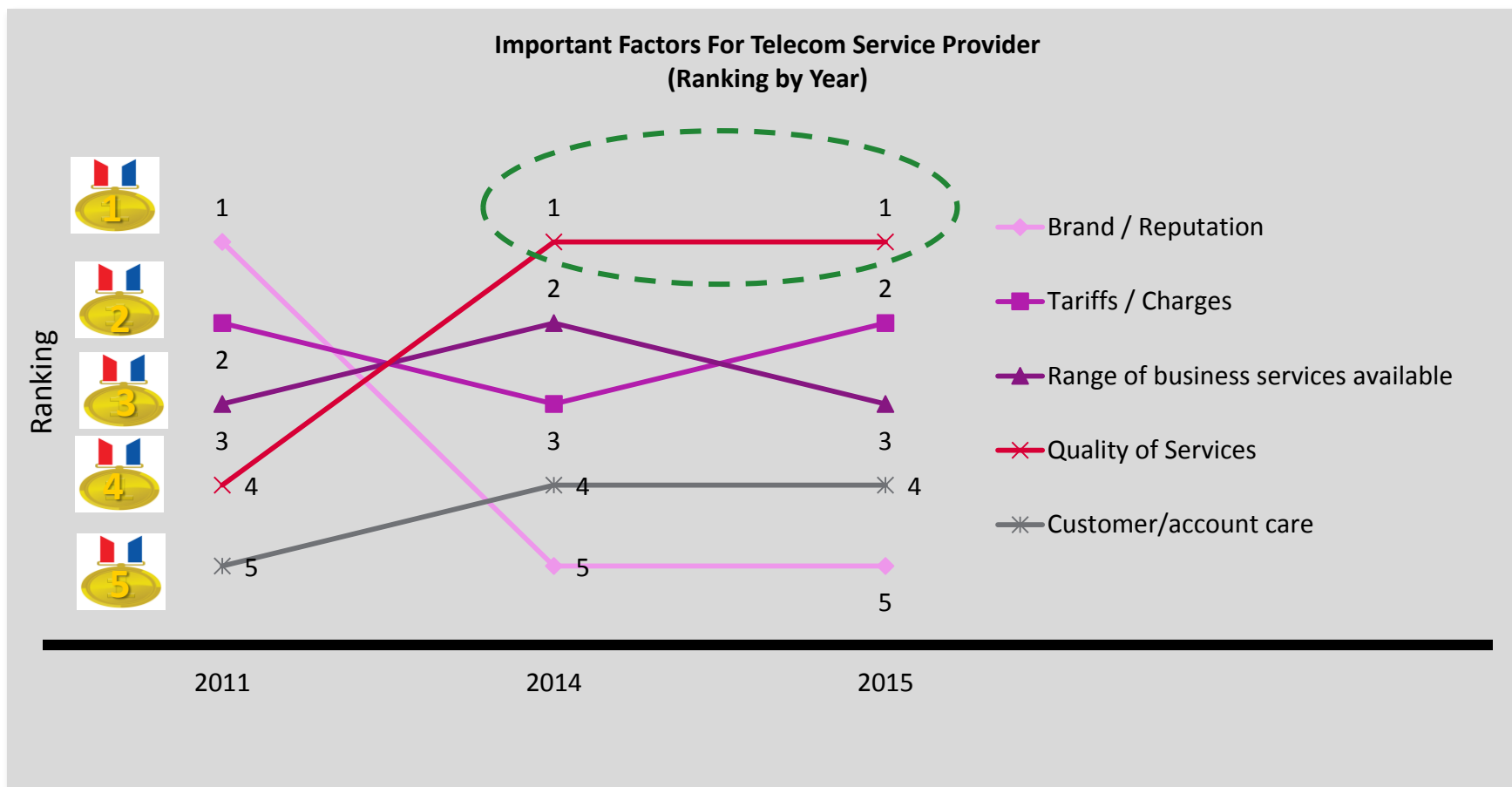
Base	Less than 20 employees	20-99 employees	100+ employees
2014	134	71	47
2015	104	88	61

Importance of Telecommunications for Business – Indispensable (% mentions)



FACTORS FOR SELECTING TELECOM SERVICES PROVIDER BY RANK OF IMPORTANCE

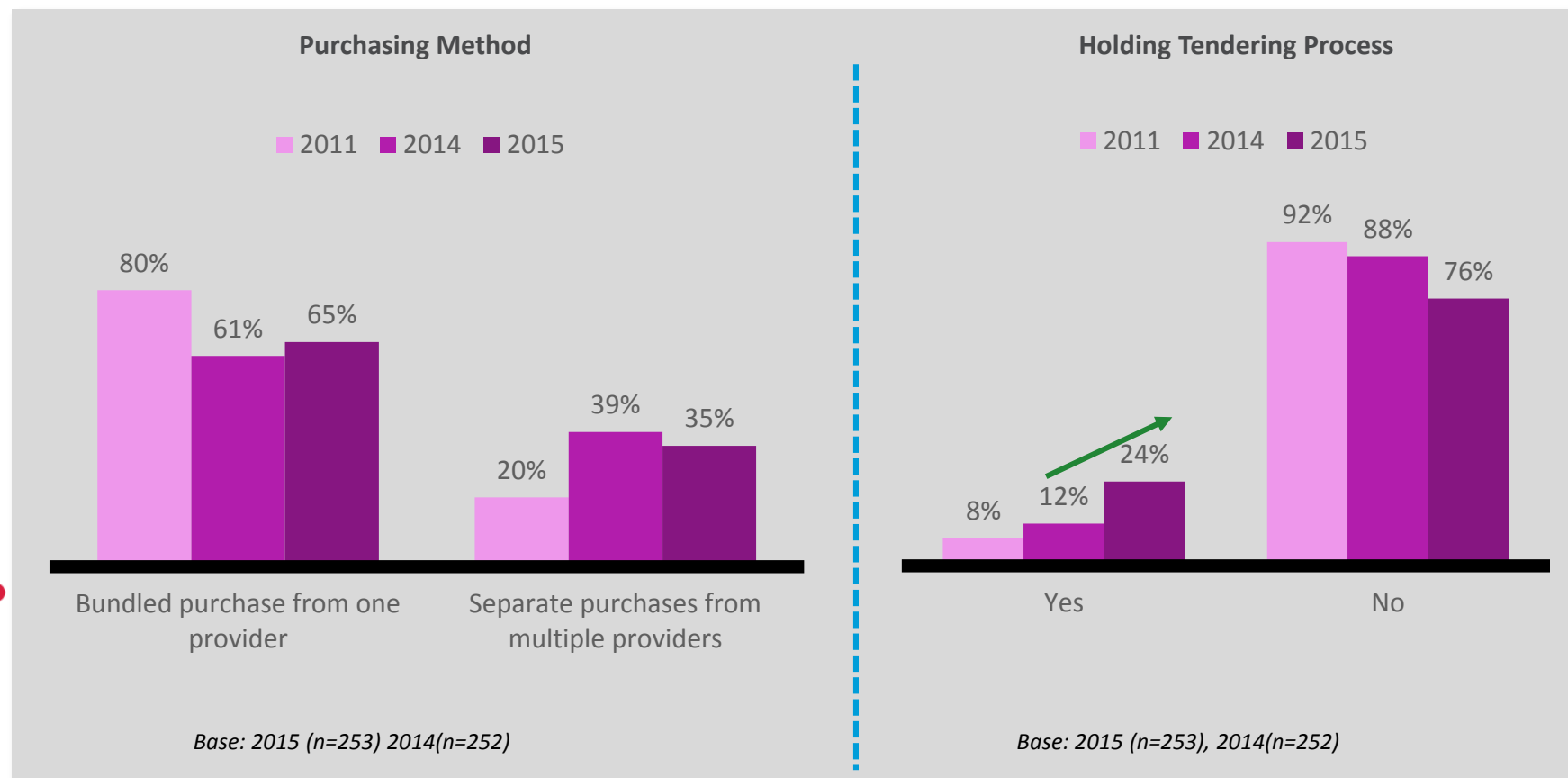
- Quality of Services and Tariffs/Charges are the most important factor for selecting telecom services provider by businesses in 2015



Q2 Companies look at different parameters while selecting a new service provider for Telecommunications. We have put some of these on this card. Please rate them as per their importance for your company

PURCHASING METHOD & TENDER PROCESS

- The majority of businesses still purchase their telecom services as a bundled purchase from one single provider in 2015.
- 24% of businesses hold tendering process in 2015 compared with only 12% in 2014.



Q4 Considering the overall purchase decision-making of telecom services, do you purchase all together as a 'bundled' purchase where one telecom provider supplies all services as part of a single contract, or do you purchase separate services from multiple providers such as fixed services from one provider and mobile services from another and so on.

Q5. Do you hold competitive tendering process for telecom services you consider purchasing and invite service providers to submit relevant bids?

TELECOM SERVICES

- ☐ Telecommunication Business Services
- ☒ **Fixed Line**
- ☐ Mobile Phone Service
- ☐ International Calls
- ☐ Internet Service

SUMMARY OF FIXED LINE SERVICES



The proportion of businesses who are not likely to switch from their current fixed line provider has increased gradually from 79% in 2011 to 92% in 2014 and to 86% in 2015. Primary main reason for not switching is that businesses are happy with their current service provider.

- The number of national calls has increased since 2014, with the proportion of businesses making more than 100 fixed to fixed calls per day has increased from 15% in 2014 to 23% in 2015.



In 2015 98% of businesses are satisfied with their overall fixed line service.

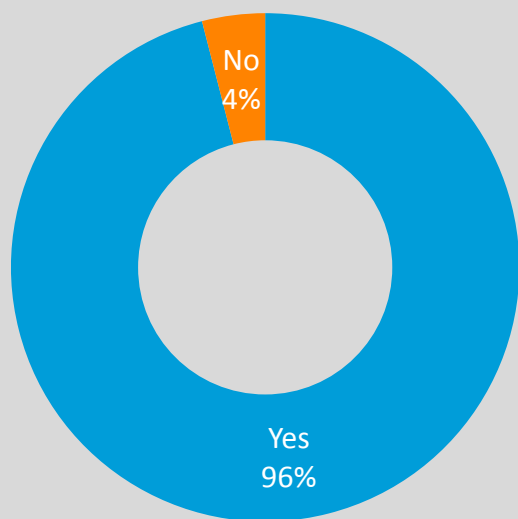
The 'Reduction in charges' and 'Improving the Quality of fixed services' are the most common improvements suggested by businesses in 2015



TYPE OF FIXED LINE CONNECTION

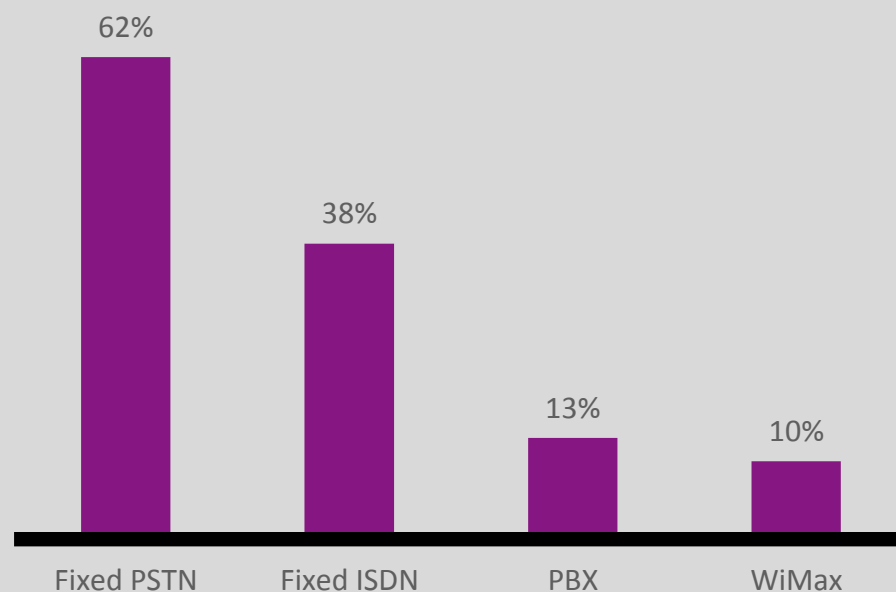
- 96% of businesses have fixed line telephone. The majority of them (62%) has fixed PSTN.

Business has access to a fixed line telephone



Base: All Respondents 2015 (n=253)

Type of fixed line connection



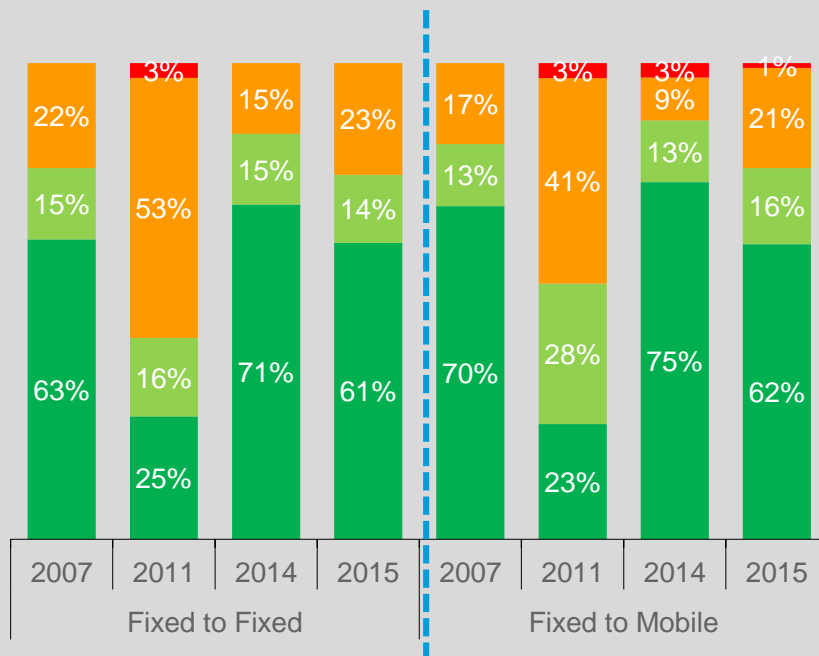
Base: Those who use fixed lines 2015 (n=242)

NUMBER OF NATIONAL CALLS MADE

- The number of national calls has increased since 2014, with the proportion of businesses making more than 100 fixed to fixed calls per day has increased from 15% in 2014 to 23% in 2015.
- On average, businesses made 69 fixed to fixed national calls per day in 2015 and 66 fixed to mobile national calls per day in 2015.

Number of National Calls

■ upto 50 calls ■ 51-100 calls ■ 100+ calls ■ Don't know

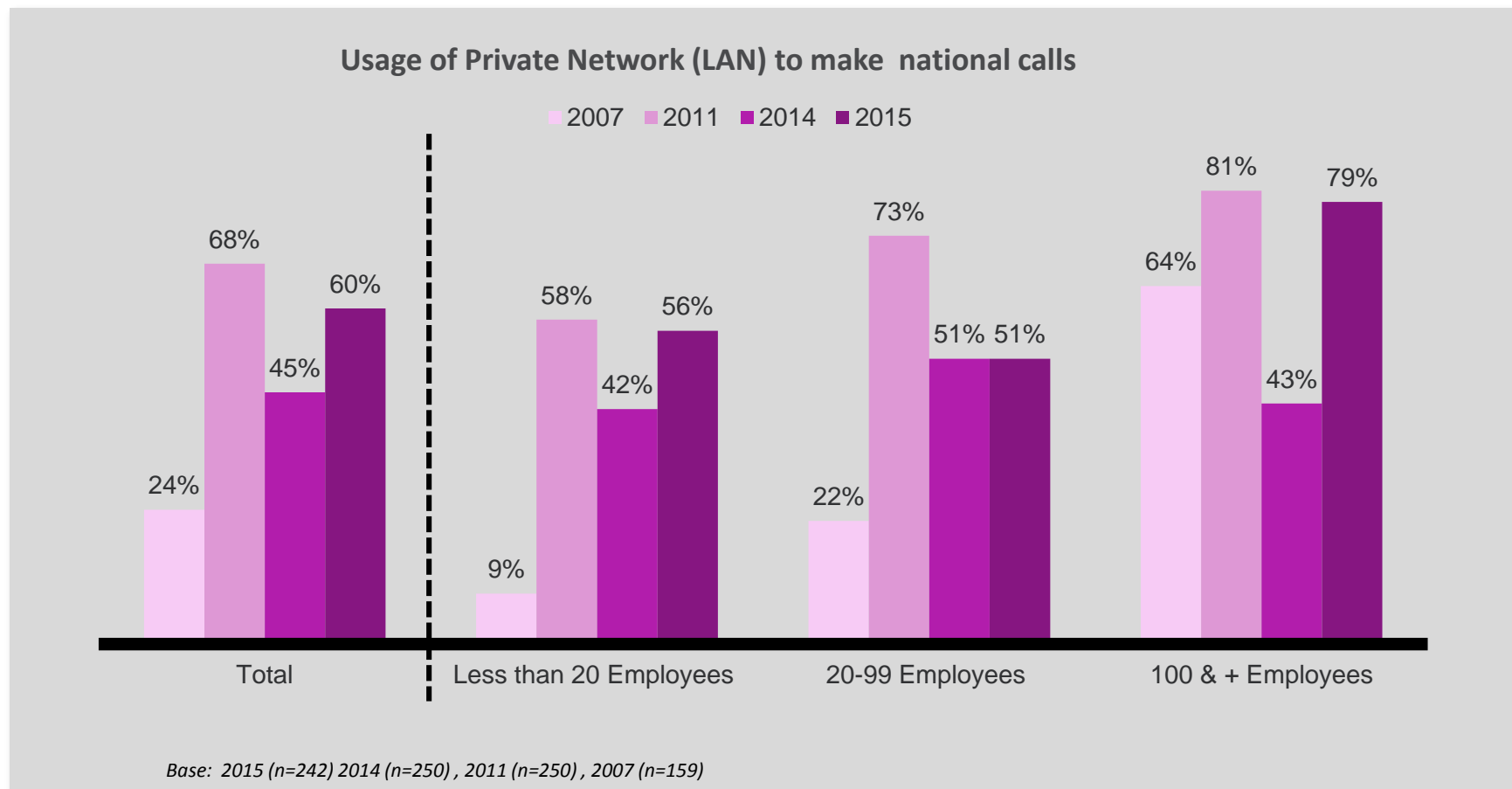


Average number of National calls	Total	Less than 20 Employees	20-99 Employees	100 & + Employees
Base -2015	242	93	88	61
Fixed to Fixed	69	40	60	128
Fixed to Mobile	66	39	60	115
Base-2014	250	132	71	47
Fixed to Fixed	58	37	61	110
Fixed to Mobile	52	35	50	100

Base: 2015 (n=242) 2014 (n=250), 2011 (n=250), 2007 (n=159)

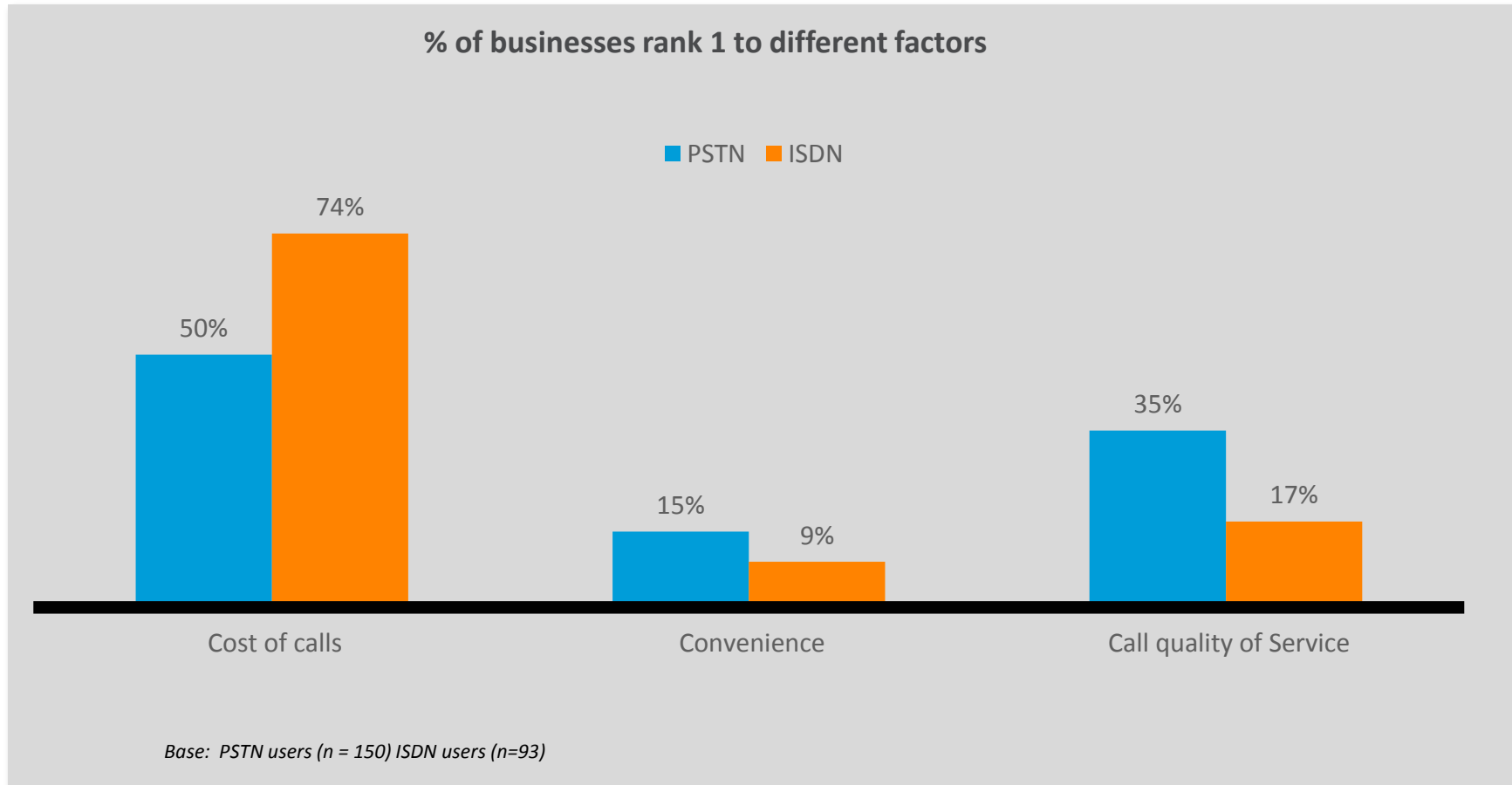
PRIVATE NETWORK (LAN) FOR NATIONAL CALLS

- Usage of Private Network (LAN) for making National calls has increased from 45% in 2014 to 60% in 2015, in particular among large businesses.



IMPORTANCE OF FACTORS TO MAKE NATIONAL CALLS: PSTN VS ISDN USERS

- Cost of calls is the main factor when deciding how to make national calls.

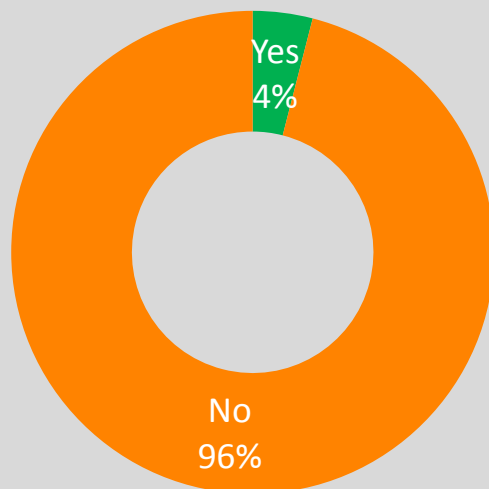


Q52 What factors are most important to your organization when deciding how you will make your National calls?

SWITCHING INTEREST (1/2)

- Only 4% of business have switched from an ISDN to Mobile Service and 1% of business have switched from PSTN to Mobile Service..
- Primary reason for ISDN customers was due to cheaper charges whereas “Better services” was the main reason for switching for PSTN customers.

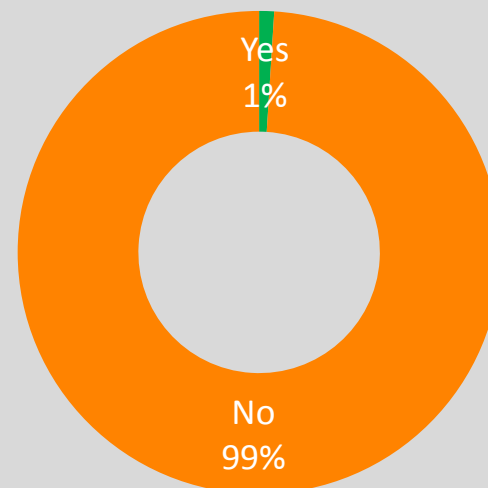
Switched from ISDN to Mobile Service



Reasons for switch:

- Cheaper Charges 25%

Switched from PSTN to Mobile Service



Reasons for switch:

- Better Services 100%

Base: 2015 (n=242)

Q17. Has your organization ever switched from an ISDN service to a mobile service?

Q18. You mentioned that your organization has switched from an ISDN line service to a mobile service. Please give the main reasons for the switch

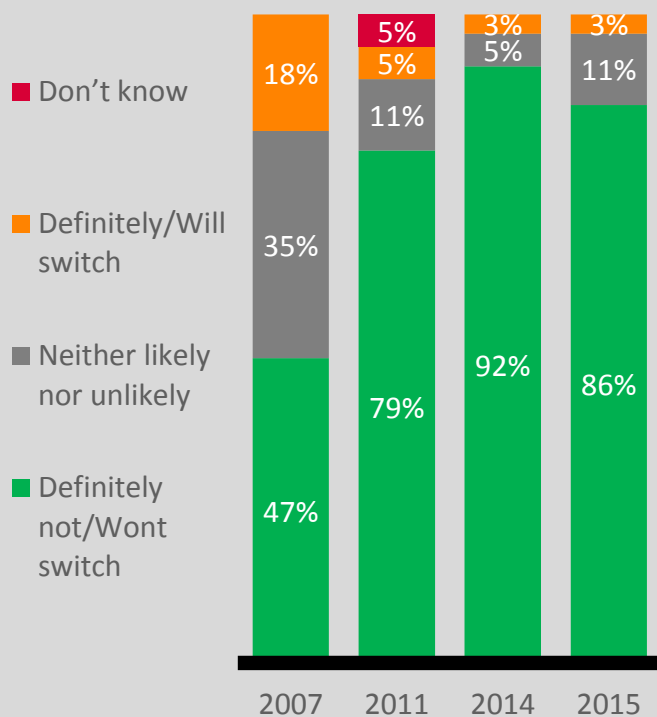
Q19. Has your organization ever switched from a PSTN service to a mobile service?

Q20. You mentioned that your organization has switched from a PSTN line service to a mobile service. Please give the main reasons for the switch

SWITCHING INTEREST (2/2)

- The proportion of businesses who are not likely to switch from their current fixed line provider has decreased from 92% in 2014 to 86% in 2015.
- The main reason for not switching in 2015 was "Happy with the current provider".

Likelihood To Switch



Base: 2015 (n=236) 2014 (N=240) , 2011 (n=250) , 2007 (n=159)

2007		2011		2014	2015
Top two reasons for switching to another provider					
Base: Who are likely to switch	28	Base: Who are likely to switch	11*	7 *	8*
Cheaper Price	50%	Cheaper Charges	27%	86%	50%
Better Service	43%	More promotions	18%	14%	50%
Top two reasons for not switching					
Base: Who are likely not to switch	75		199	222	203
Don't want to change the number	36%	Happy with current provider	63%	92%	85%
Satisfied with Batelco	27%	Difficult to switch to other provider	30%	6%	15%

* Low Base

Q26 Now tell me on a 5 point scale where 5 means 'definitely switch' and 1 means 'definitely not switch' , how likely is your company to switch to another telecom service provider **for Fixed Line?**

Q27 You mentioned that your organization is likely to switch fixed line service provider. Please give the most important reason for the switch

Q28 You mentioned that your organization is not likely to switch fixed line service provider. Please give the most important reason for not to switch

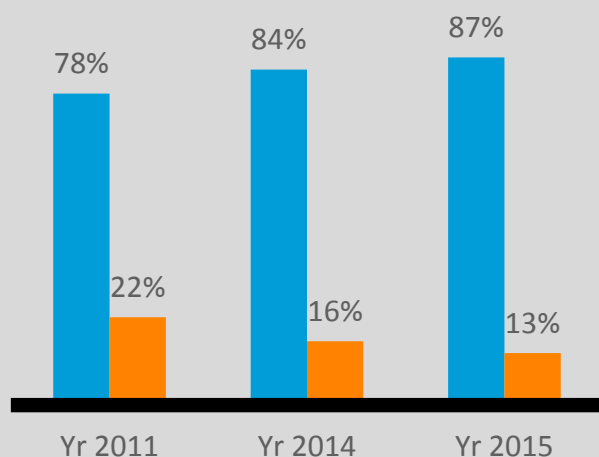
FIXED LINE EXPENDITURE

- For businesses, national calls still represent a significant proportion of fixed line expenditure. In 2015 87% of total fixed line expenditures is to national calls compared to 84% in 2014.
- Average monthly spend among Large Businesses is significantly higher compared to previous year (BD 1,297 in 2015, BD 1,003 in 2014).

Base	Total	Less than 20 Employees	20-99 Employees	100+ Employees
2015	242	93	88	61
2014	250	132	71	47
2011	250	113	73	64
2007	159	66	65	28

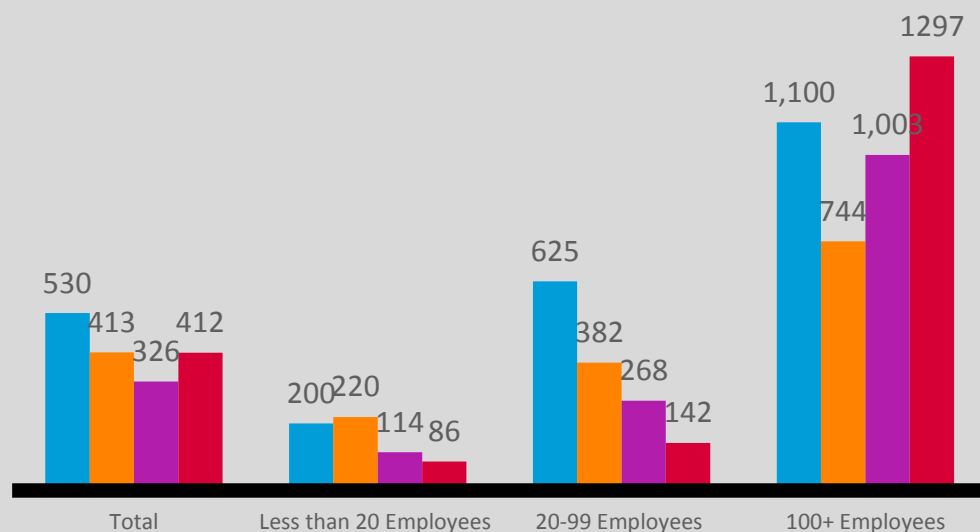
Spend Split

■ National Calls Expense
 ■ International Calls Expense



Average monthly Spend

■ Yr 2007 ■ Yr 2011 ■ Yr 2014 ■ Yr 2015

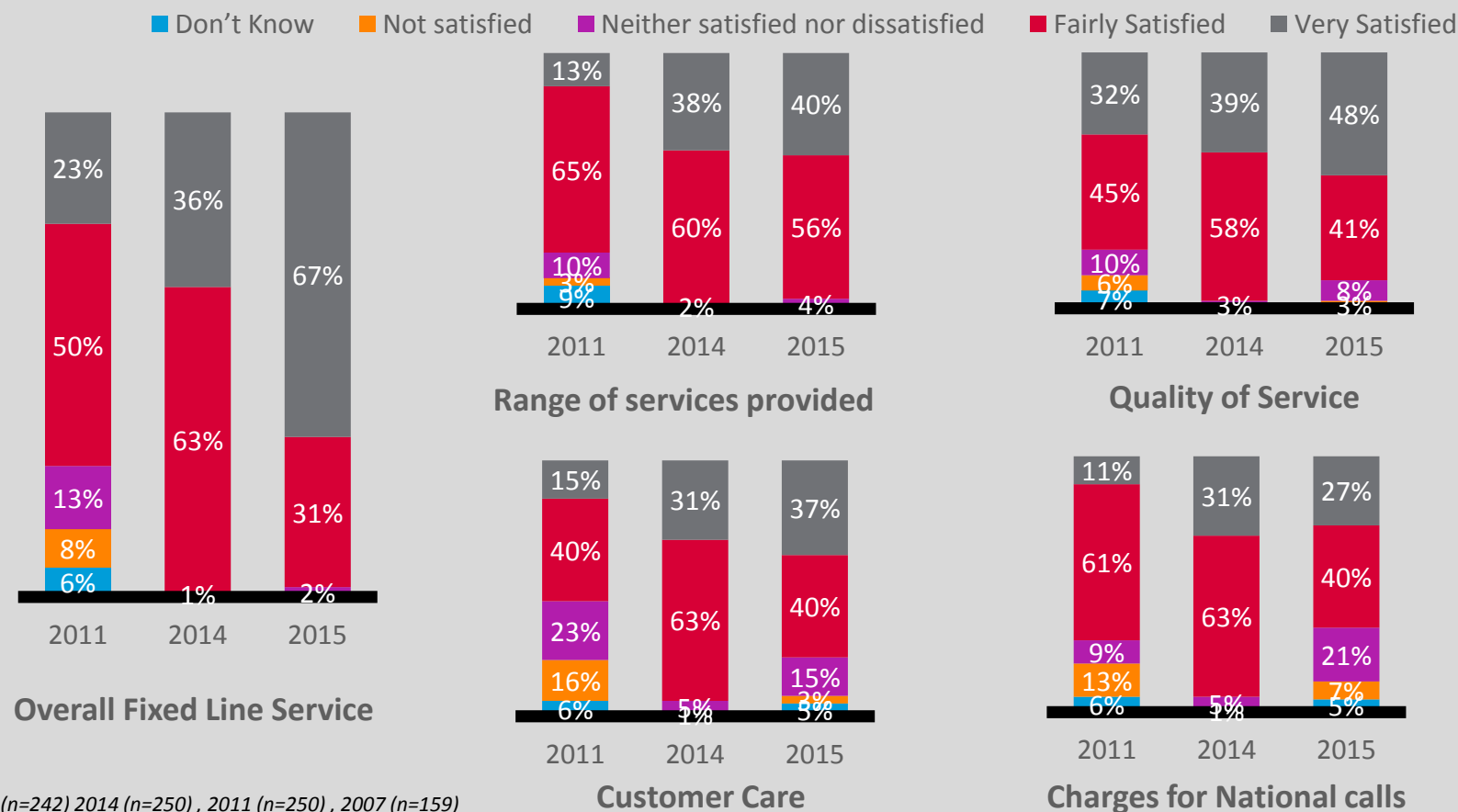


Q29. Now I would like to talk to you about the expenses on telecom services. Could you please tell me what is your average monthly spend on Fixed Line (including fax) on National Calls?

Q31. Please tell us approximately what % of your fixed line spend are National calls and International Calls?

SATISFACTION WITH FIXED LINE SERVICES

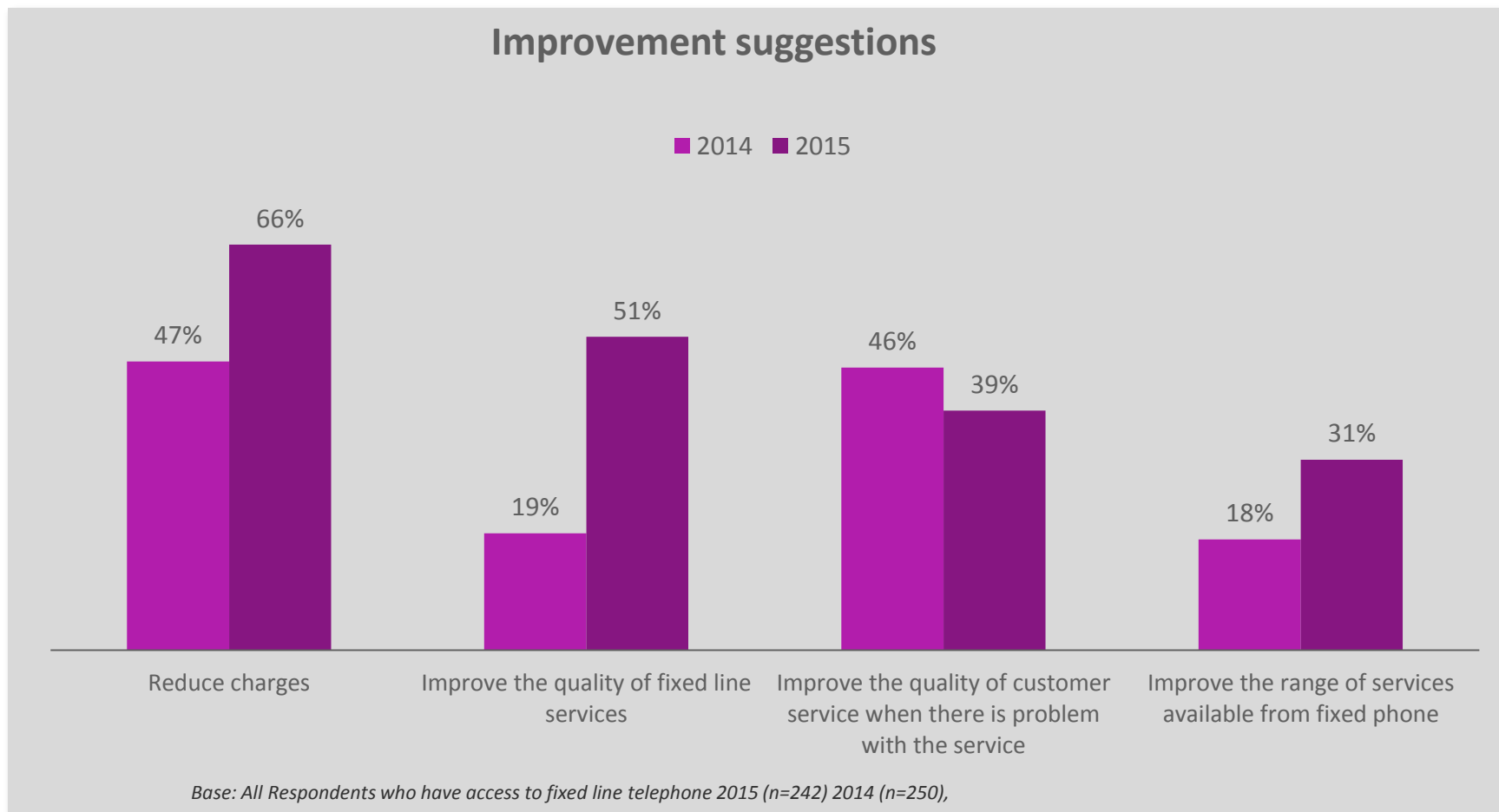
- Satisfaction levels among businesses towards fixed line services has significantly increased.
- In 2015 98% of businesses are fairly or very satisfied with their overall fixed line service.
- However, satisfaction with 'charges for national calls' has decreased from 94% in 2014 to 67% in 2015.



Q32. How satisfied are you with the following elements of your **fixed line service**?

IMPROVEMENT SUGGESTIONS FOR FIXED LINE

- The 'Reduction in charges' and 'Improving the Quality of fixed services' are the most common improvements suggested by businesses in 2015 (66% and 51% respectively).



TELECOM SERVICES

- ☐ Telecommunication Business Services
- ☐ Fixed Line
- ☐ **Mobile Phone Service**
- ☐ International Calls
- ☐ Internet Service

SUMMARY OF MOBILE PHONE SERVICES



The proportion of businesses who provide mobile phones to employees has decreased to 55% in 2015 compared with 85% in 2011, with mobile workforce is the main reason for using mobile phones (62%) followed by availability of additional services (51%)

15% of businesses have switched between mobile phone operators in 2015 compared to 28% in 2014.



National calls still represent the majority of mobile phone expenditure in 2015 with 89% of total mobile spend by businesses is for notational calls in 2015 compared with 85% in 2014.

SMS (61%), International roaming, conference calls (54%) and Data service (43%) are the main value added services used by businesses in 2015.

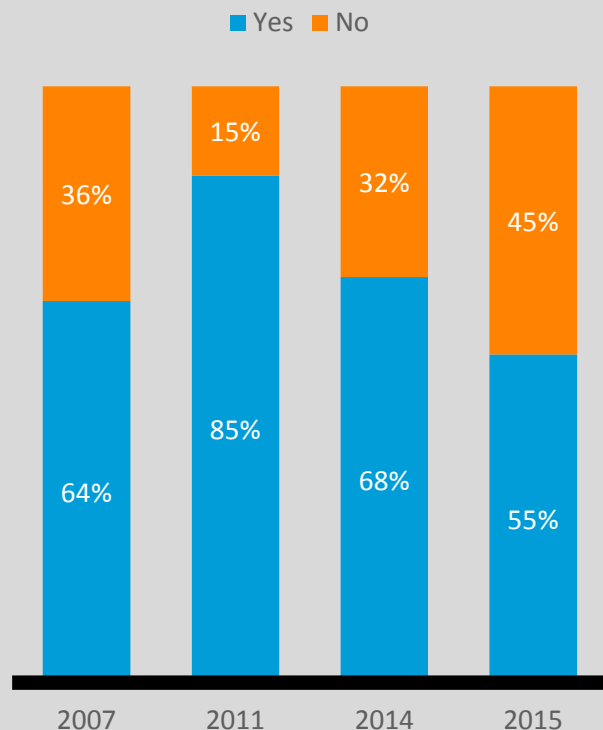


The Reduction in charges and improving the quality of mobile phone services are the main improvements suggested by businesses (64% and 53% respectively).

COMPANY PROVISION OF MOBILE PHONES

- The proportion of businesses who provide mobile phones to employees has decreased to 55% in 2015 compared with 68% in 2014.
- The proportion of businesses who provide mobile phones to employees increases with the size of businesses.
- Mobile workforce is still the main reason for business to use mobile phones in 2015.

Provision of mobile phones to employees



Provision of Mobiles to Employees (%)	Less than 20 Employees	20-99 Employees	100 & + Employees
<i>Base: All Respondents</i>	134	71	47
2014	64%	68%	81%
<i>Base: All Respondents</i>	104	88	61
2015	34%	64%	77%

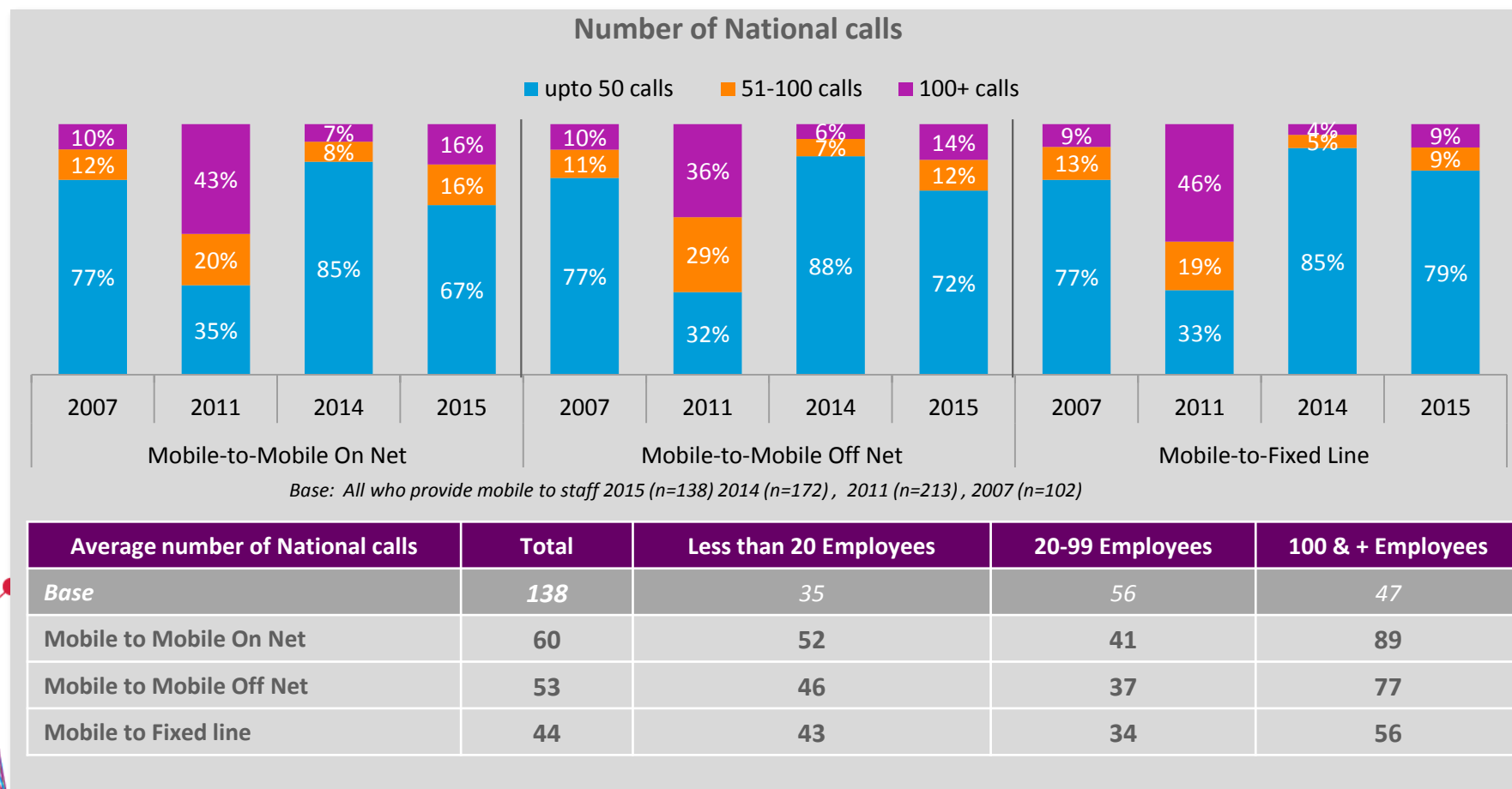
Reasons for providing Mobile Phones	2007	2011	2014	2015
<i>Base:</i>	159	250	172	138
Mobile Workforce	75%	42%	81%	62%
Can control spending	14%	37%	17%	30%
Availability of additional services	25%	31%	47%	51%
Quality services	31%	23%	40%	48%

Q34 Does your organization provide mobile phones to staff?

Q38 Main reasons for organization to use mobile phones

NATIONAL CALLS MADE FROM MOBILE

- 16% of businesses are making 100 and above calls on a daily basis in 2015 compared with only 7% in 2014.

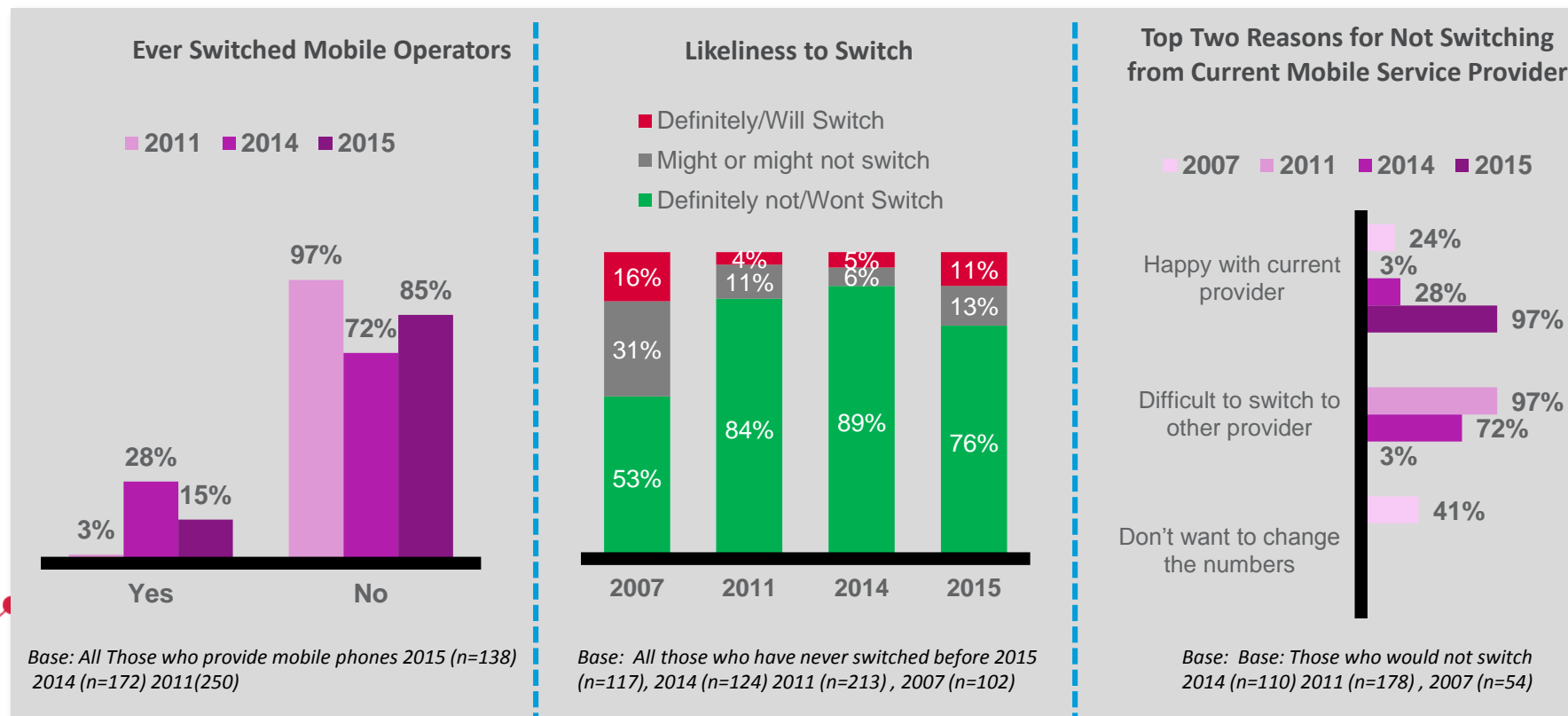


Q40. Now I would like to know the number of calls made through mobile.

As I read out each type please see this card tell me how many calls are made approximately on a daily basis?

SWITCHING INCLINATION – MOBILE SERVICES

- 15% of businesses have switched between mobile phone operators in 2015.
- 76% of businesses are unlikely to switch from their current mobile service provider in 2015 compared with 89% in 2014.
- Being happy with current provider is still the main reason for not switching in 2015.



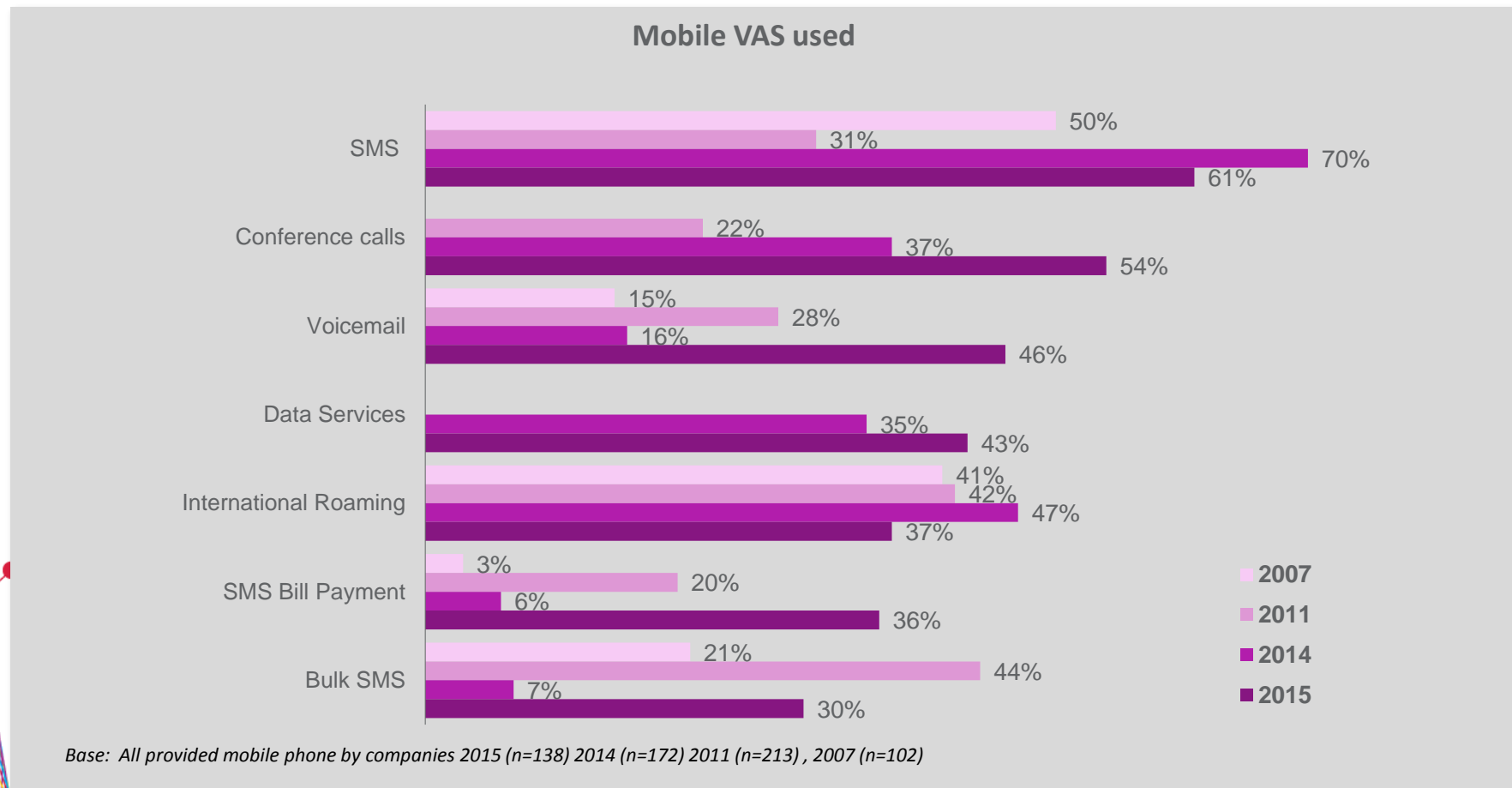
Q42. Now I wanted to know specifically for mobiles, has your organization ever switched between mobile phone operators?

Q44. Now tell me on a 5 point scale where 5 means 'definitely switch' and 1 means 'definitely not switch', How likely is your organization to switch to another **mobile phone service** provider?]

Q46. You mentioned that your organization is NOT likely to switch mobile phone service provider. Please tell me what is the most important reason for switching to another mobile phone provider

MOBILE VALUE ADDED SERVICES

- SMS (61%), conference calls (54%) and International roaming (46%) are the main value added services used by businesses in 2015.
- Bulk SMS has increased significantly from 7% in 2014 to 30% in 2015.

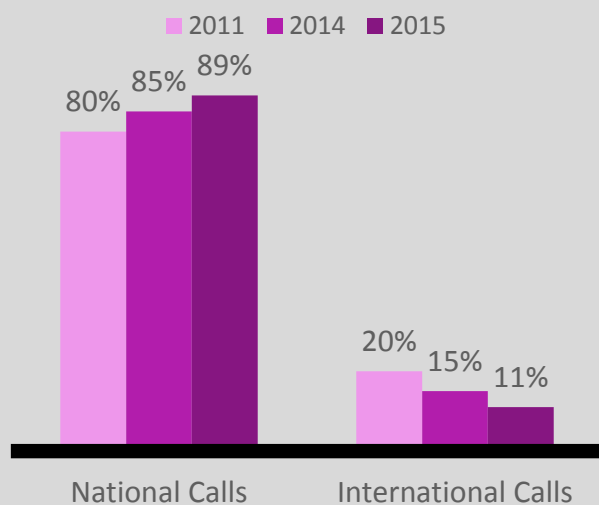


MOBILE EXPENDITURE

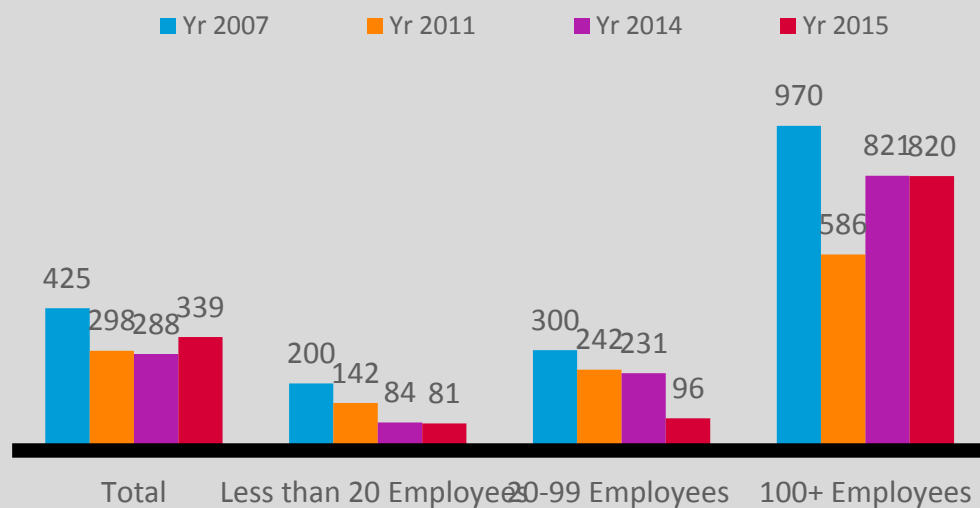
- National calls still represent the majority of mobile phone expenditure in 2015 with 89% of total mobile spend by businesses is for national calls in 2015 compared to 80% in 2011.
- Average monthly spend on mobile has slightly increased in 2015.

Base	Total	Less than 20 Employees	20-99 Employees	100+ Employees
2015	138	35	56	47
2014	172	86	48	38
2011	250	113	73	64
2007	159	66	65	28

Spend Split



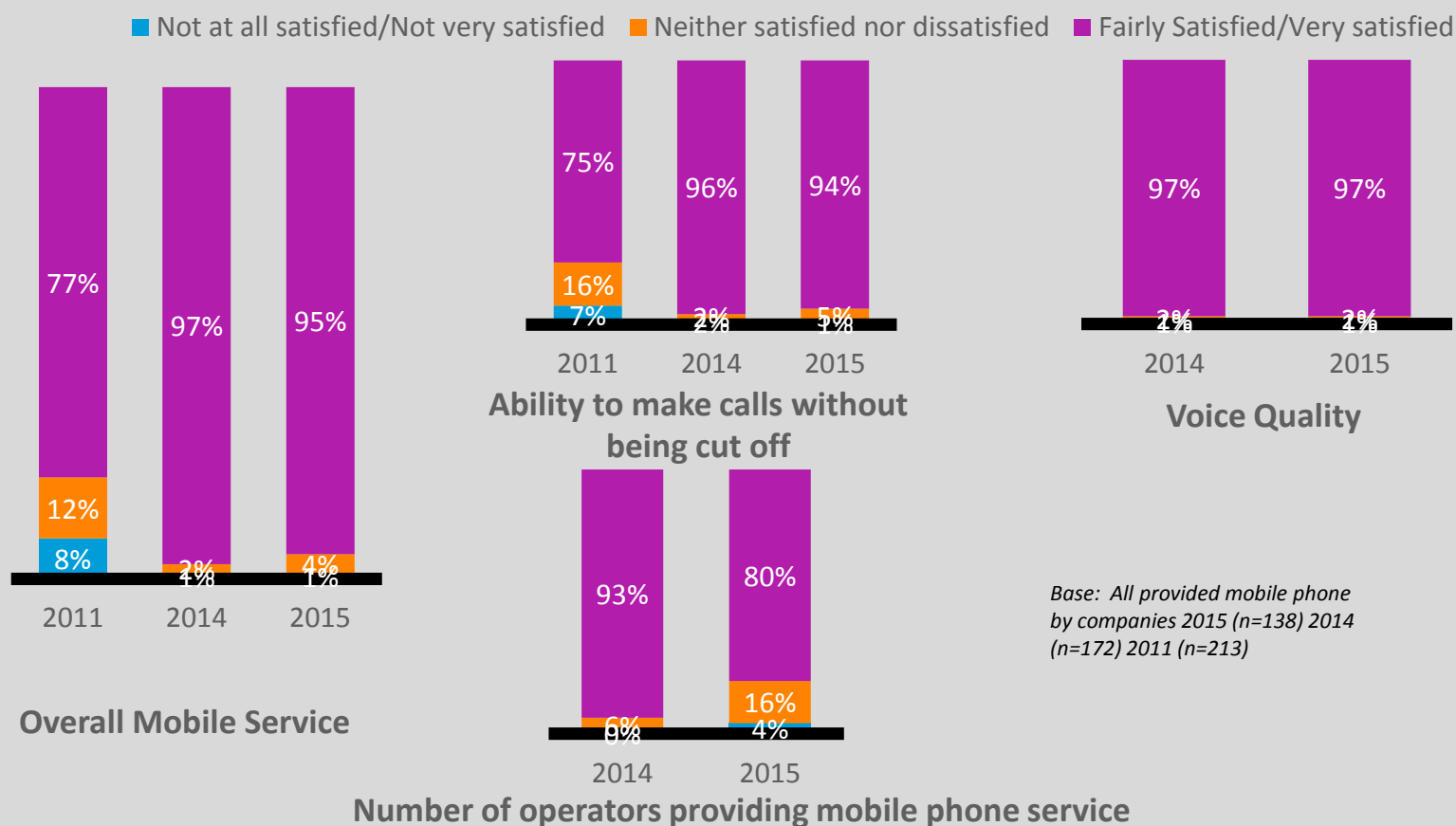
Average monthly Spend (BD)



Q.47 Thinking about your mobile phone provided by your organization please tell me approximately what % of spend are National calls and International Calls?
Q48. Split of National Calls and International Calls?

SATISFACTION WITH MOBILE SERVICES (1/2)

- Satisfaction levels among businesses with mobile phone services remains at high level.
- However, satisfaction with number of operators providing mobile phone services has dropped from 93% in 2014 to 80% in 2015.



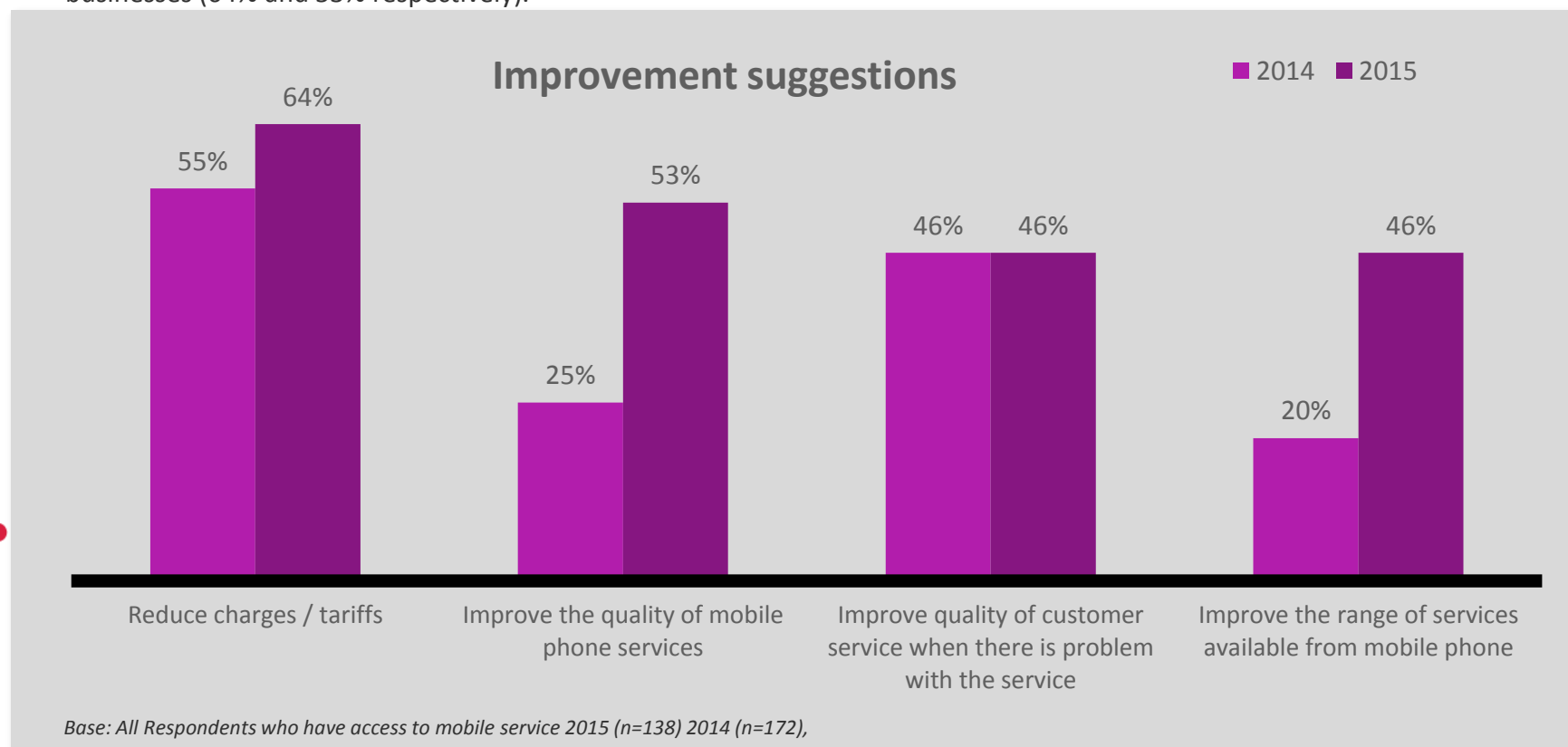
SATISFACTION WITH MOBILE SERVICES (2/2)

- Satisfaction with price of national calls made from mobile phone has also decreased from 89% in 2015 to 79% in 2015.



IMPROVEMENT SUGGESTIONS FOR MOBILE SERVICE

- Although more than 90% of businesses are satisfied with their mobile phone services, some businesses have improvements suggestions regarding their mobile phone services.
- The Reduction in charges and improving the quality of mobile phone services are the main improvements suggested by businesses (64% and 53% respectively).



[Q50. Could you please tell me if there are any suggestions you would like to make to help serve you better in the future for mobile phone line?]

TELECOM SERVICES

- ☐ Telecommunication Business Services
- ☐ Fixed Line
- ☐ Mobile Phone Service
- ☐ **International Calls**
- ☐ Internet Service

SUMMARY OF INTERNATIONAL CALLS



Direct dial using fixed line (97% of businesses) and direct dial using mobile phone (88% of businesses) are still extensively used to make international calls in 2015.

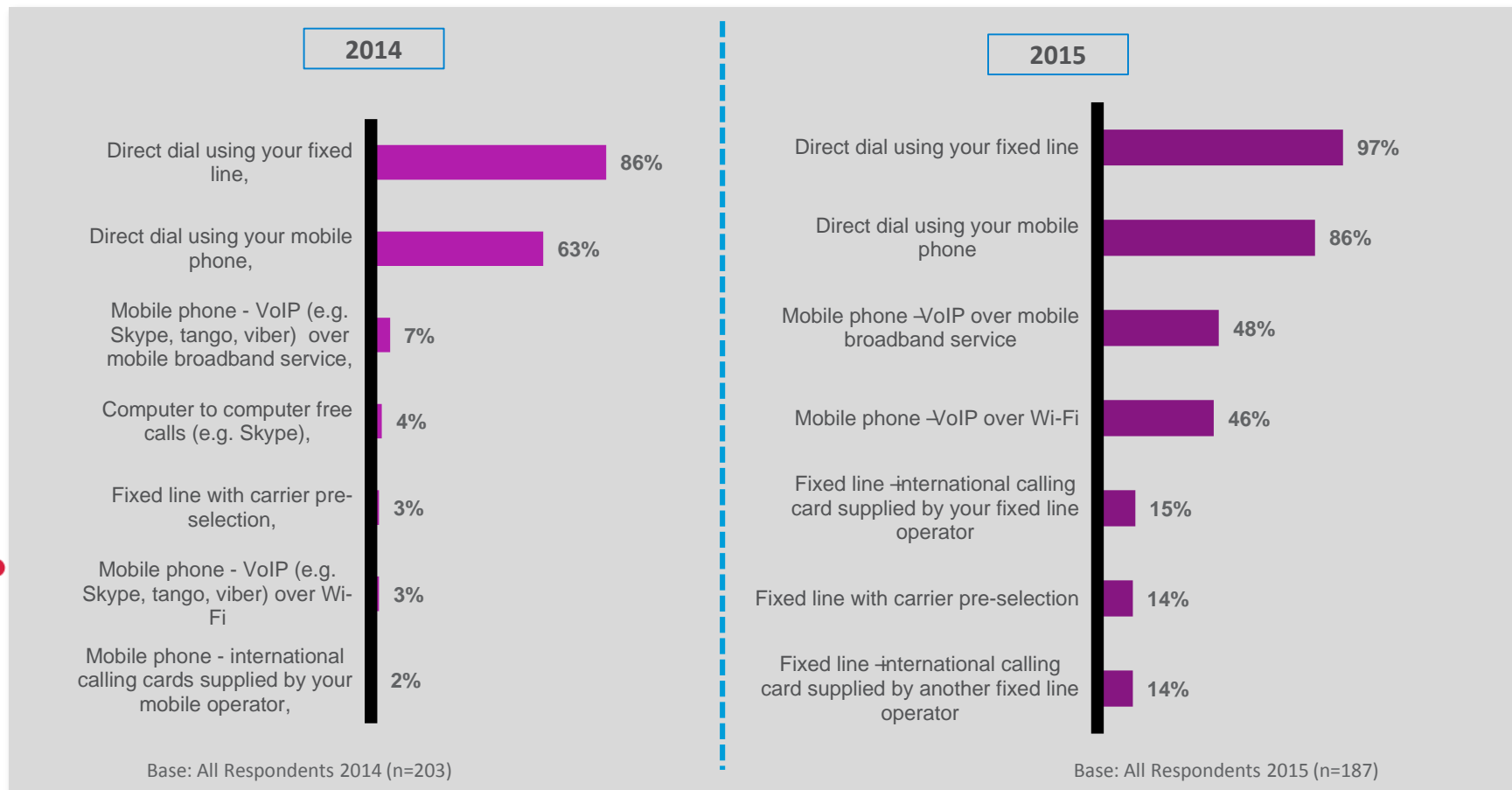
UAE (75%) followed by KSA (73%) are the most common called countries using fixed line in 2015.



31% of businesses making international calls stated that if the price of fixed international calls were to increase by 10%, the business would switch to making that call using an OTT application such as skype

OPTIONS USED TO MAKE INTERNATIONAL CALLS

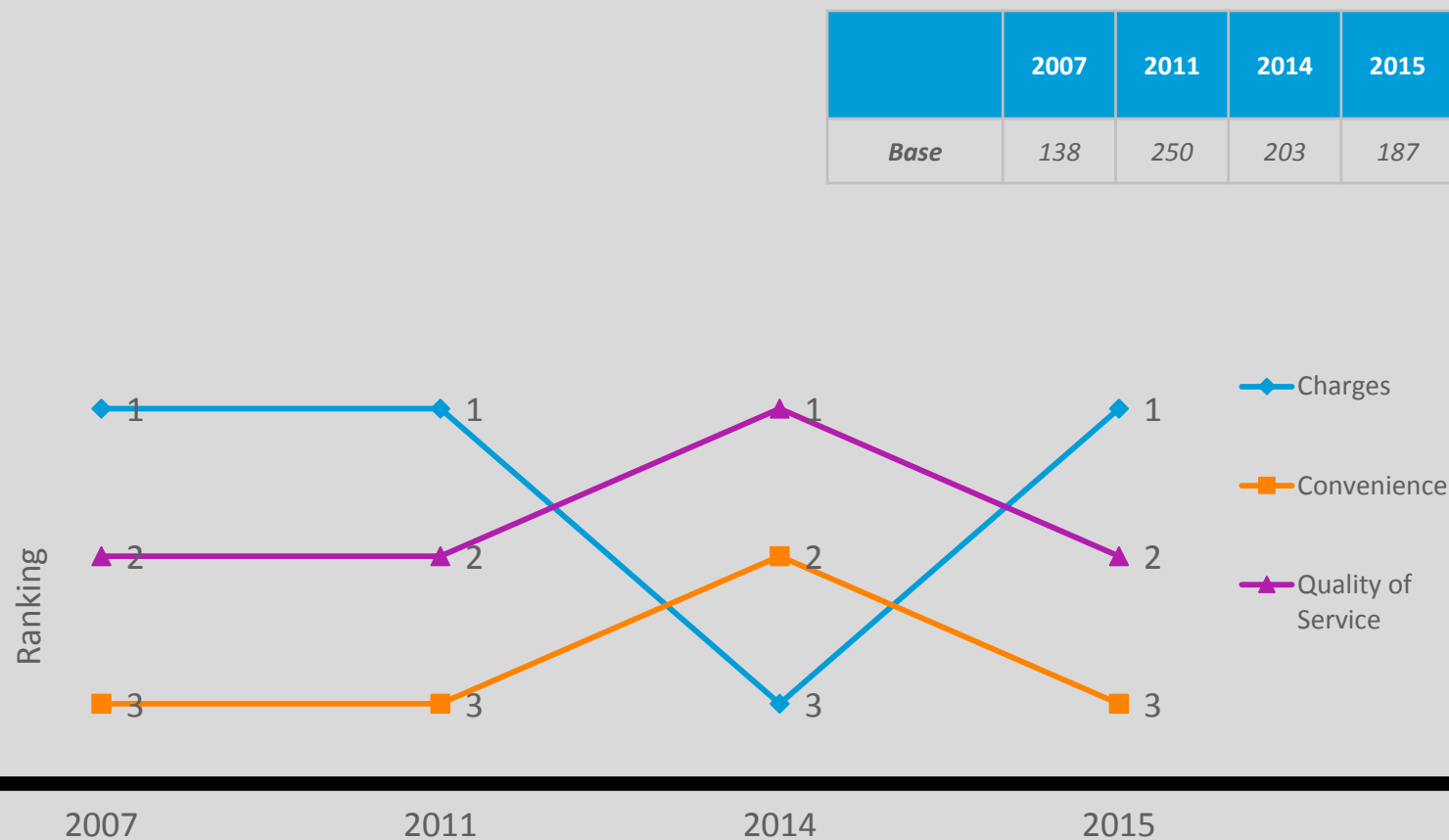
- Direct dial using fixed line (97% of businesses) and direct dial using mobile phone (88% of businesses) are still extensively used to make international calls in 2015.
- International Calls over Wifi has increased significantly in 2015.



[Q55 Now please tell me how many international calls does your organization make approximately every week from

IMPORTANT FACTORS FOR MAKING INTERNATIONAL CALLS – BY RANK

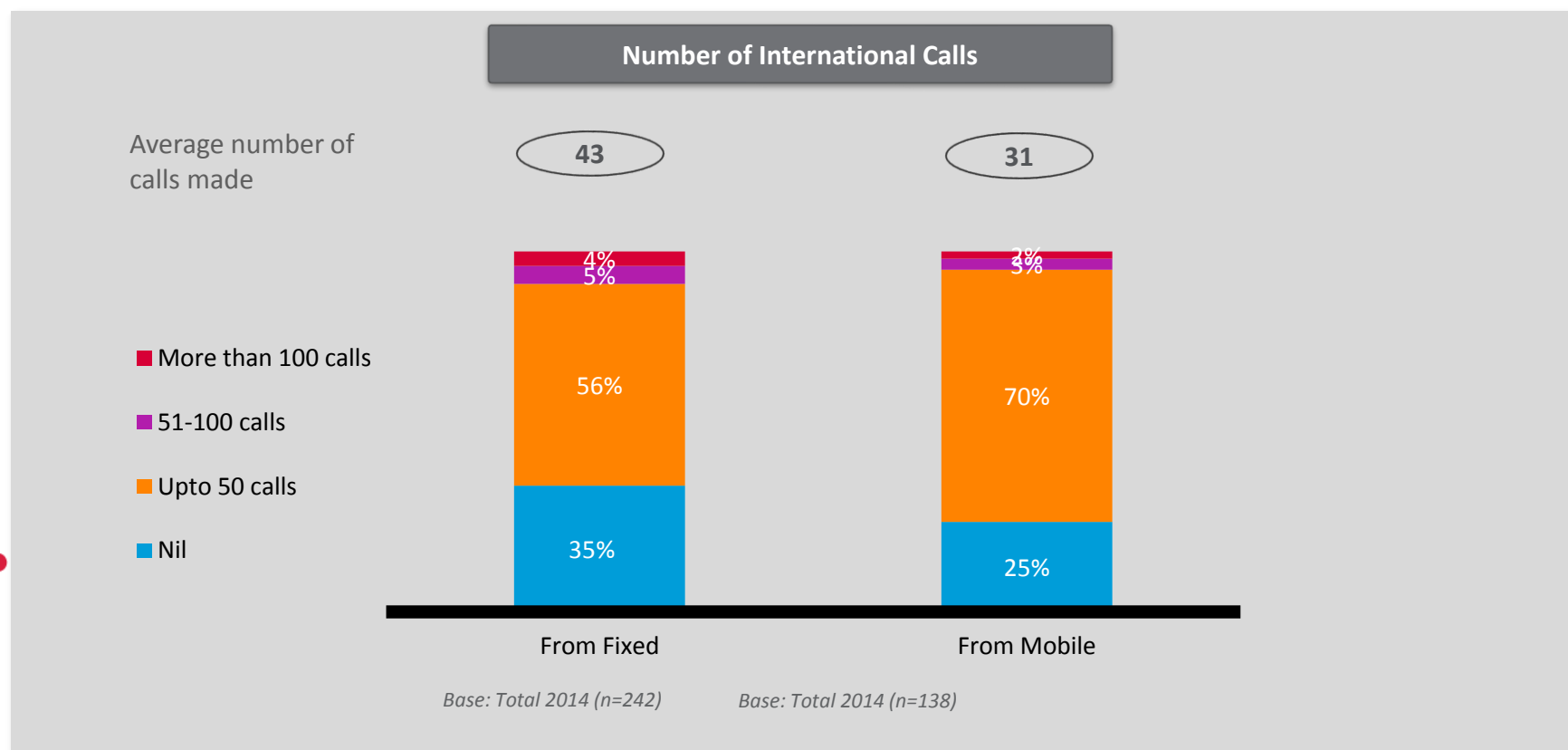
- Charges was the most important factor for making international calls in 2015.



Q56. What factors are most important to your organization when deciding how you will make your international calls?

NUMBER AND DURATION OF INTERNATIONAL CALLS MADE

- More than 50% of businesses make up to 50 international calls per day with an average of 43 international calls from a fixed line service and an average of 31 international calls from a mobile phone.

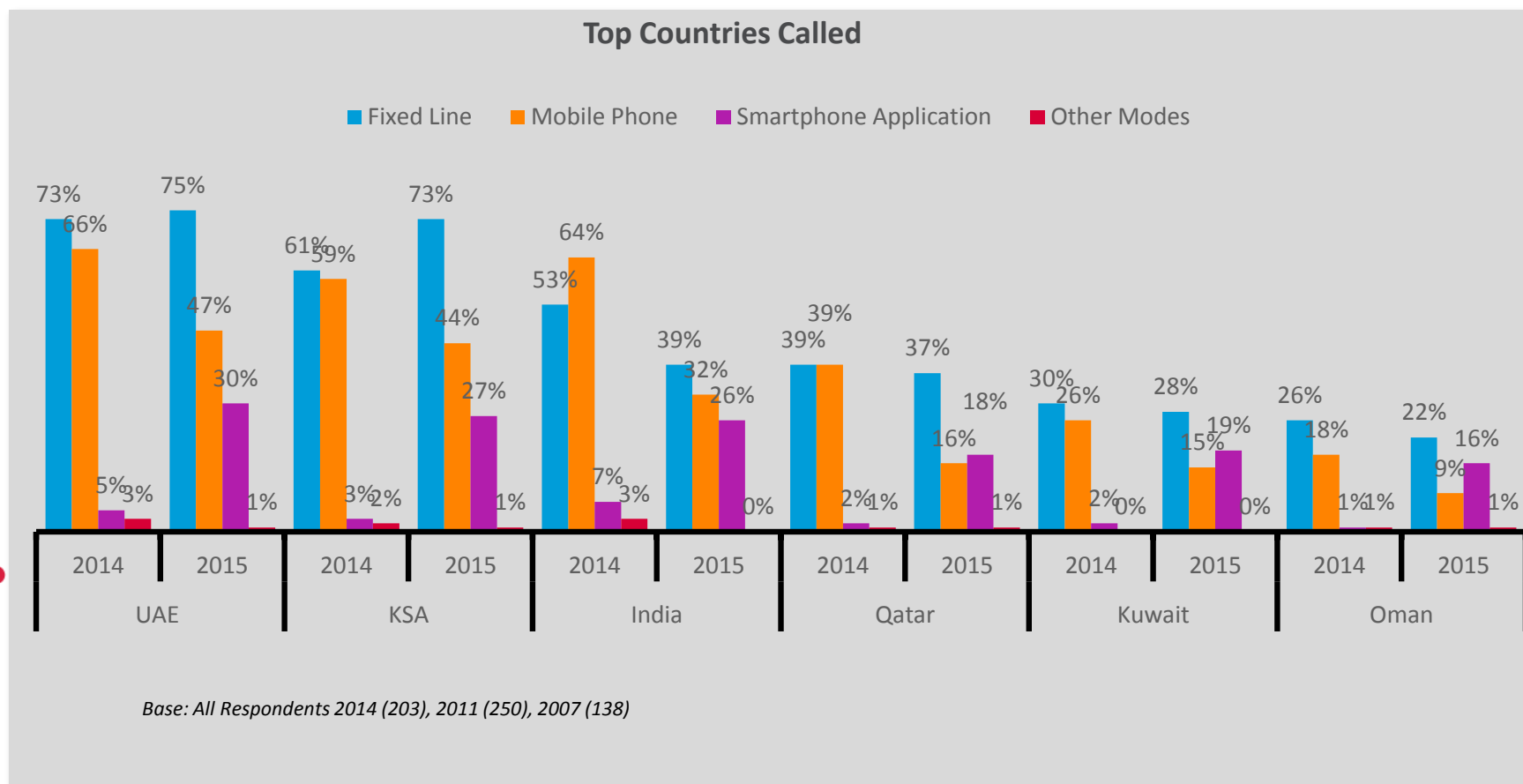


Q15] Please see this card tell me how many calls are made approximately on a daily basis?

Q40] Now I would like to know the number of calls made through mobile. As I read out each type please see this card tell me how many calls are made approximately on a daily basis?

DESTINATIONS OF INTERNATIONAL CALLS

- UAE (75%) followed by KSA (73%) are the most common called countries using fixed line in 2015.
- However, the proportion of businesses using fixed line to call KSA has increased from 61% in 2014 to 73% in 2015.



[Q57] Which countries did your organization call using...

SWITCHING MODE OF INTERNATIONAL CALLS

40% of businesses making international calls stated that if the price of fixed international calls were to increase by 10%, the business would **switch to mobile**.



Whereas...



31% of businesses making international calls stated that if the price of fixed international calls were to increase by 10%, the business would switch to making that call using an **OTT application such as skype**

Base: All Respondents (n=785)

[Q58] If the price of fixed international calls were to increase by 10%, would you switch to mobile.

[Q59] If the price of fixed international calls were to increase by 10%, would you switch to making that call using an OTT application such as skype

TELECOM SERVICES

- ☐ Telecommunication Business Services
- ☐ Fixed Line
- ☐ Mobile Phone Service
- ☐ International Calls
- ☐ **Internet Service**

SUMMARY OF INTERNET 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.

Web presence of business has dropped slightly since 2011 from 80% in 2011 to 71% in 2014 and then to 66% in 2015, mainly in medium and small size businesses.



Getting information from general government organizations has increased significantly from 44% in 2011 to 73% in 2015.

The majority of businesses are satisfied with internet services (i.e. overall services; range of services quality of services and charges).

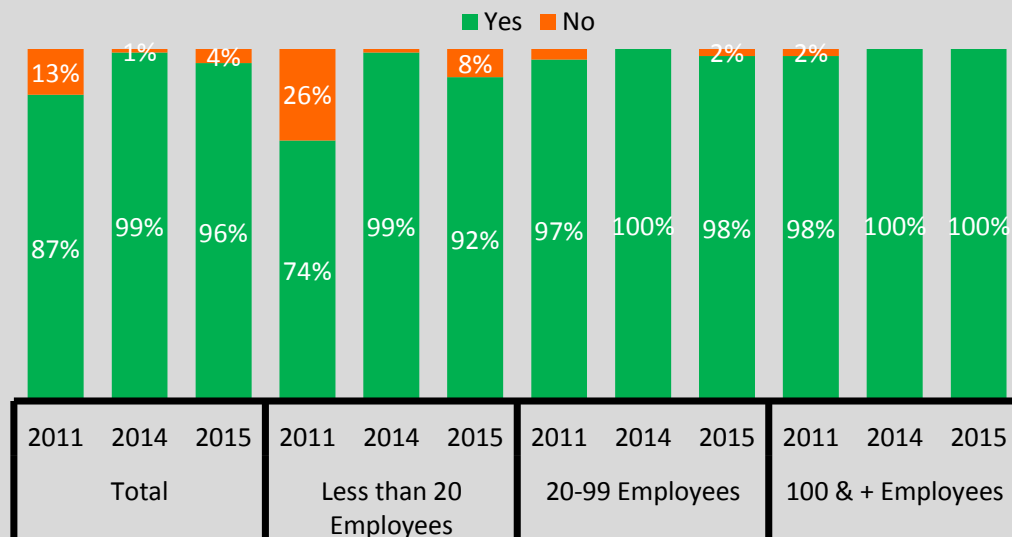


Reducing charges/tariffs (64%) and Improving quality of internet services (51%) are the top suggestions for improvement of internet service in 2015

ACCESS TO INTERNET

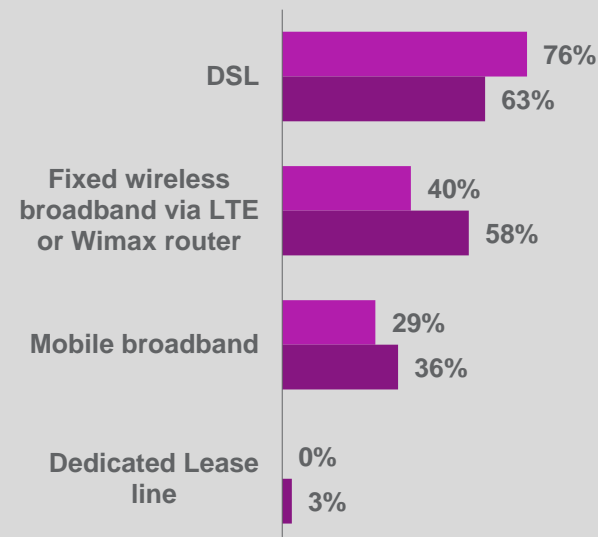
- Internet is essential for the exchange of information in today's business environment.
- 96% of businesses have internet access in their offices compared to 87% in 2011.
- 63% of businesses have DSL connection in 2015 compared with 76% in 2014.

Internet Access In Office



Base: All Respondents 2015 (n=253), 2014 (n=251) 2011 (n=250)

Internet Connection Type



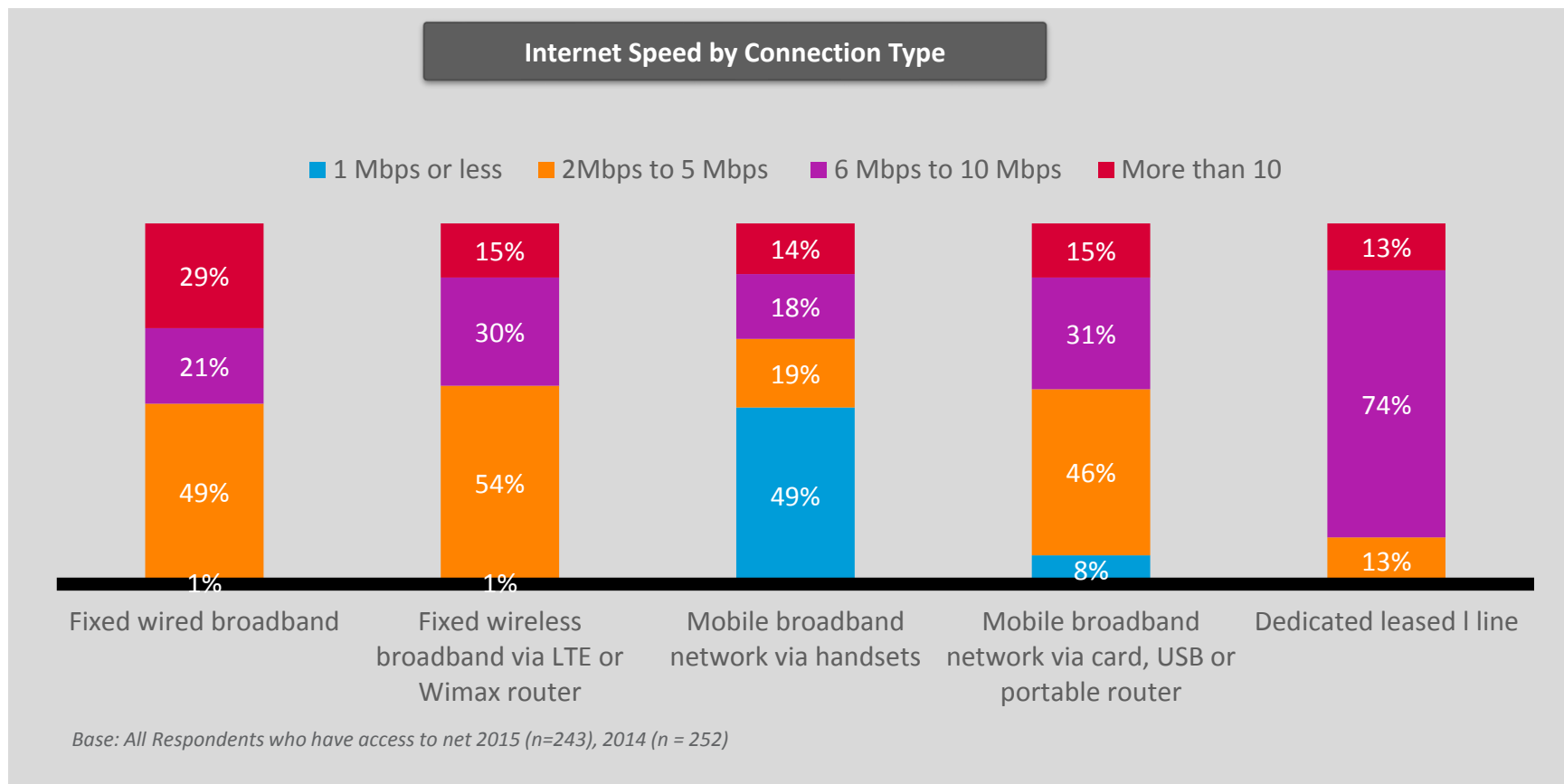
Base: All Respondents 2015 (n=243), 2014 (n=250)

Q61. Did your organization have an internet connection in the last 12 months?

Q62. How did your organization connect to the Internet during the last 12 months?

BROADBAND CONNECTIONS

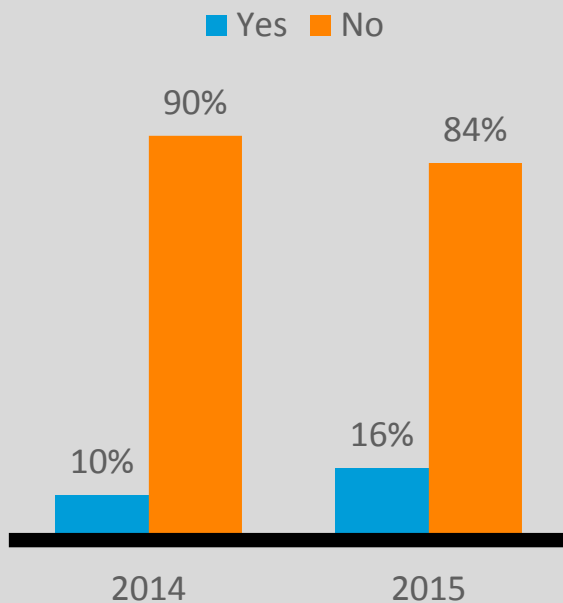
- Of those who have fixed wired broadband, 99% have internet connection more than 2mbps.



SWITCHING OF INTERNET CONNECTIONS (1/2)

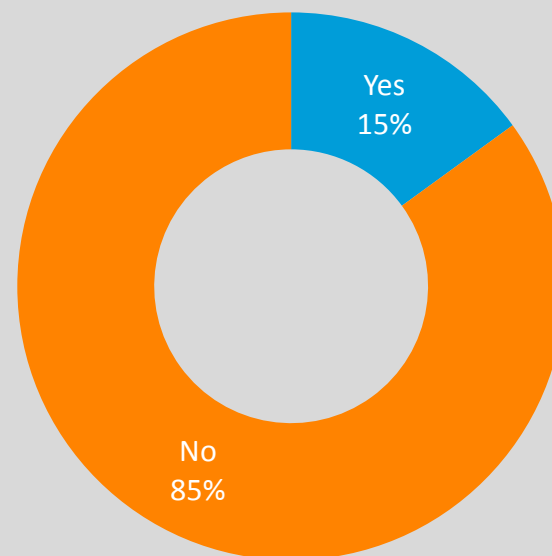
- 16% of businesses have switched their internet connection type in 2015.
- 15% of businesses stated that they would switch to mobile broadband if there is 10% rise in their current fixed internet monthly expense.

Ever switched between internet connections



Base: All having the Internet access 2015 (n=243) 2014 (n= 250)

10% rise in cost will make business switch to mobile broadband



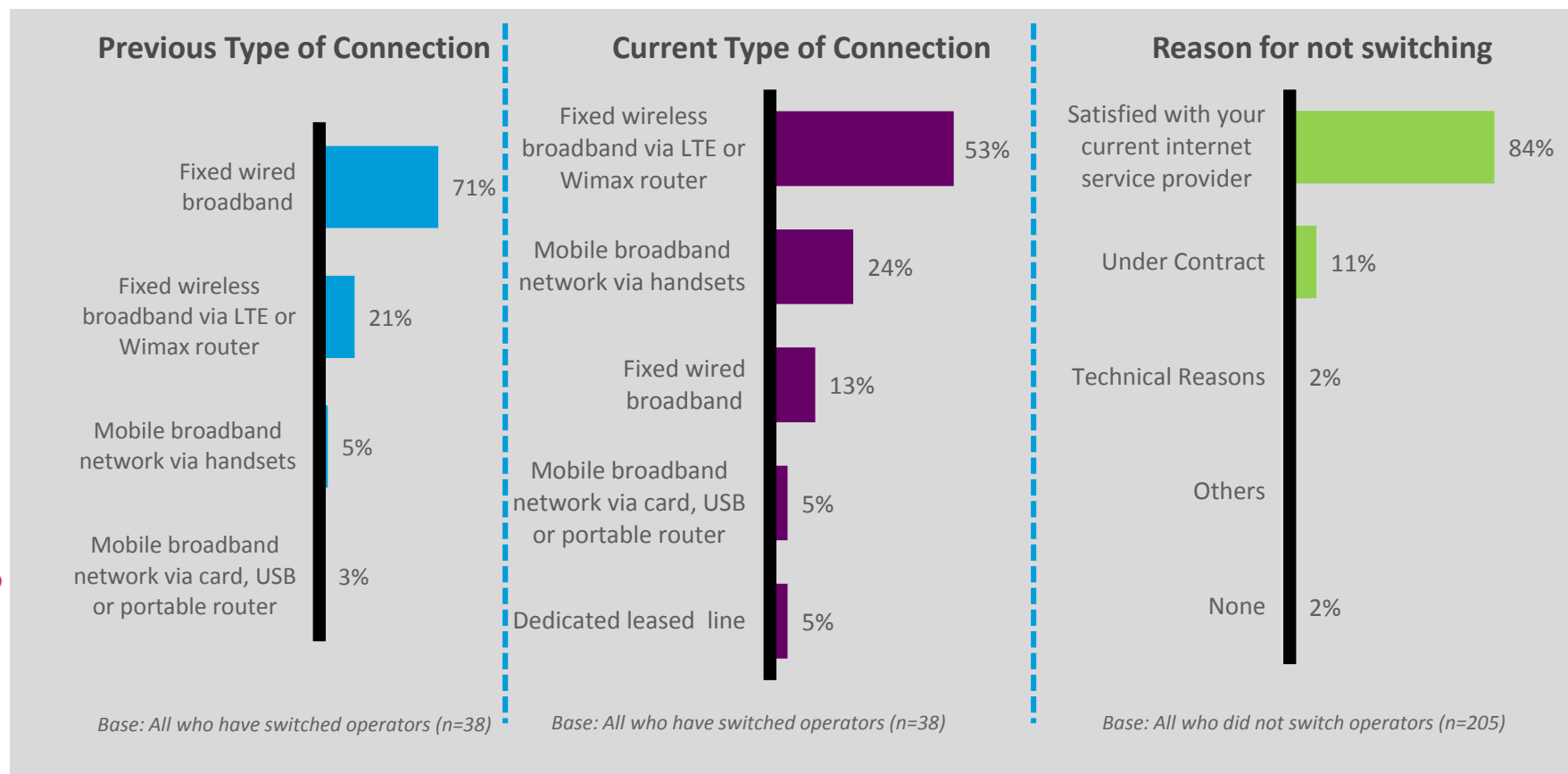
Base: All having the Internet access 2015 (n=243)

Q64 Has your organization ever switched between different types of internet connections

Q70 If your current fixed internet monthly expense increased by the following percentages, would you consider switching to a mobile broadband service (e.g. using 'dongle' or router)

SWITCHING OF INTERNET (2/2)

- Among those who have switched, 71% of businesses have switched from fixed wired broadband and 53% of businesses switched to fixed wireless broadband via LTE or Wimax router in 2015.
- 84% of the businesses did not switch as they were happy with current service provider whereas 11% of businesses did not switch as they were under contract.



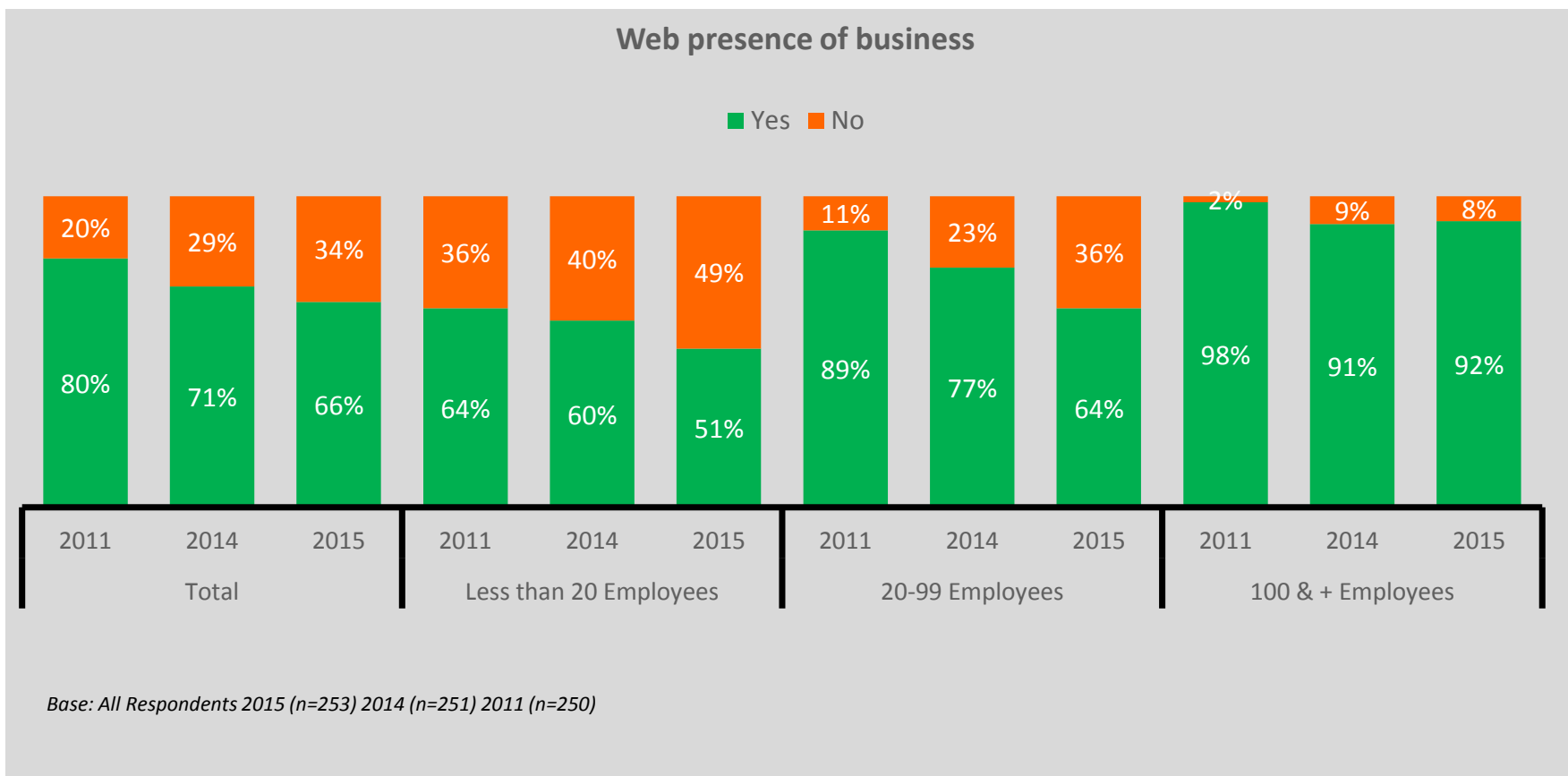
Q67 What was your internet connection type previously?

Q68 What is your current type of internet connection?

Q69 What is the main reason for not considering switching internet service provider?

WEB PRESENCE

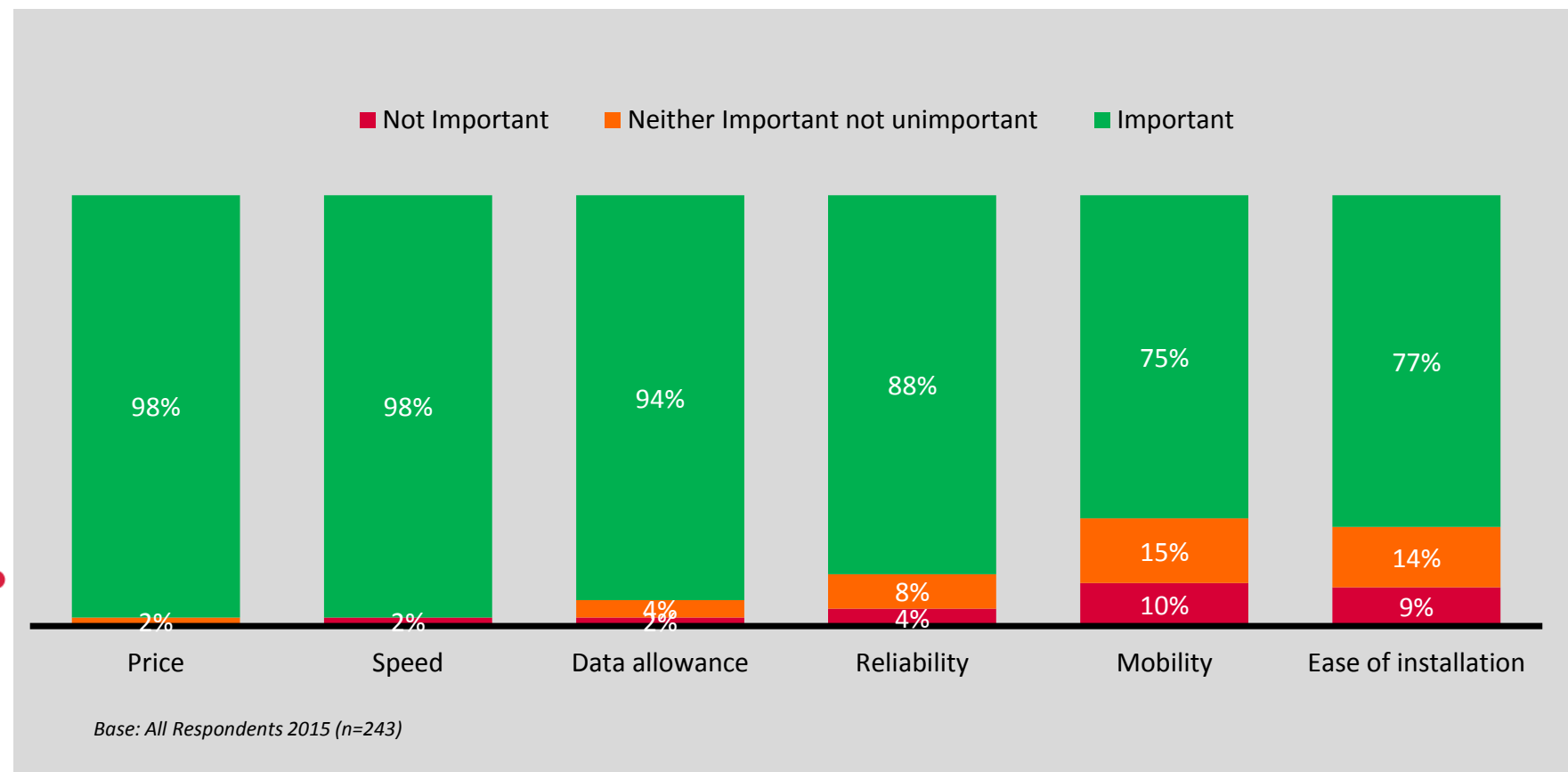
- Web presence of business has dropped slightly since 2011 from 80% in 2011 to 71% in 2014 and then to 66% in 2015, mainly in medium and small size businesses.



Q10 Please tell us if your business has any kind of web presence. A web presence includes a website, homepage or presence on another entity's website (including a related business)?

IMPORTANCE OF FACTORS WHEN SELECTING INTERNET SERVICE PROVIDER

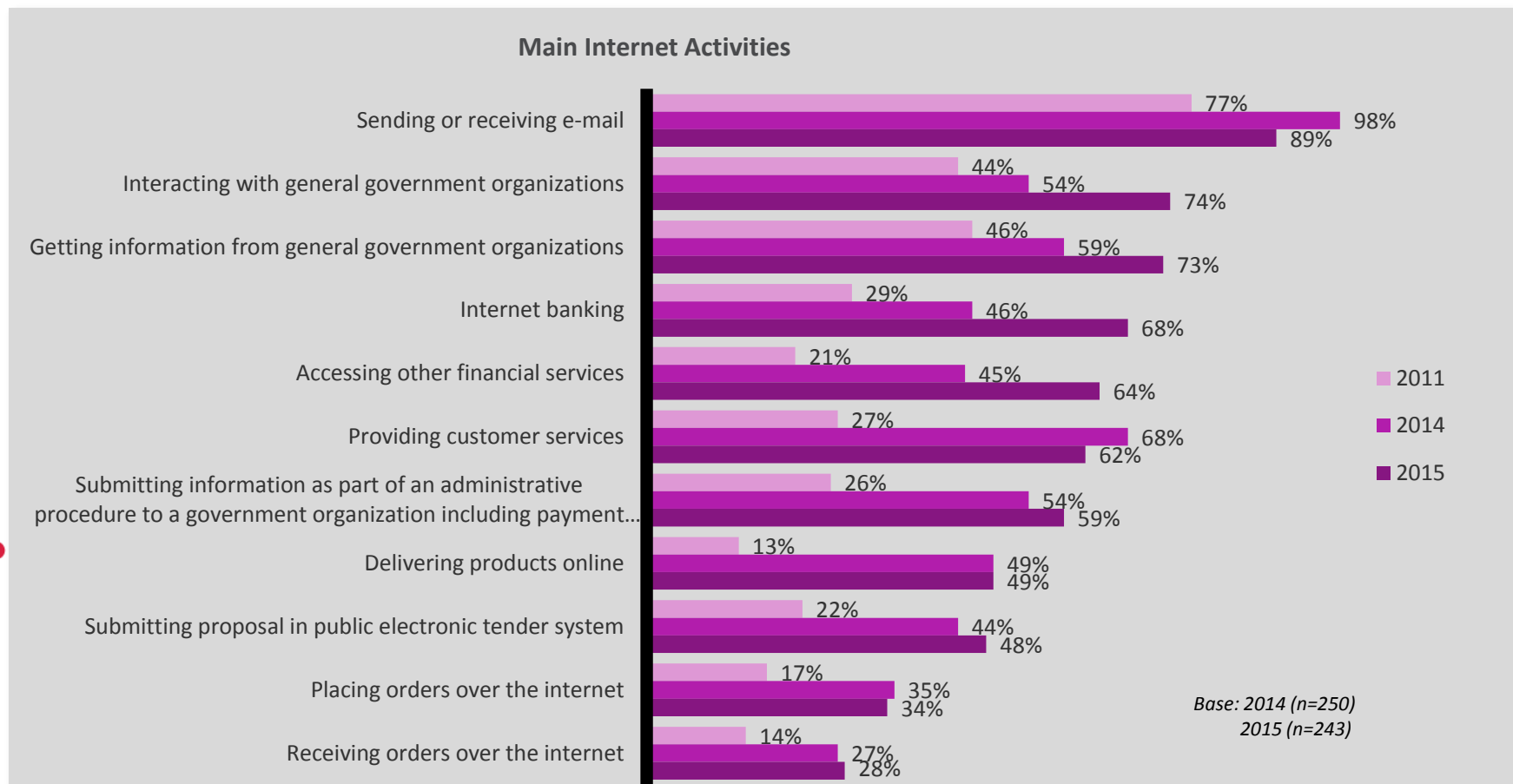
- Price and Speed are the most important factors when selecting internet service provider among businesses
- Mobility is considered as the least important factor when selecting internet service provider.



Q71 What factors are most important to you organization when selecting an internet service provider? Please rate the following factors on a 5 point importance scale where 5 means extremely important and 1 means not at all important

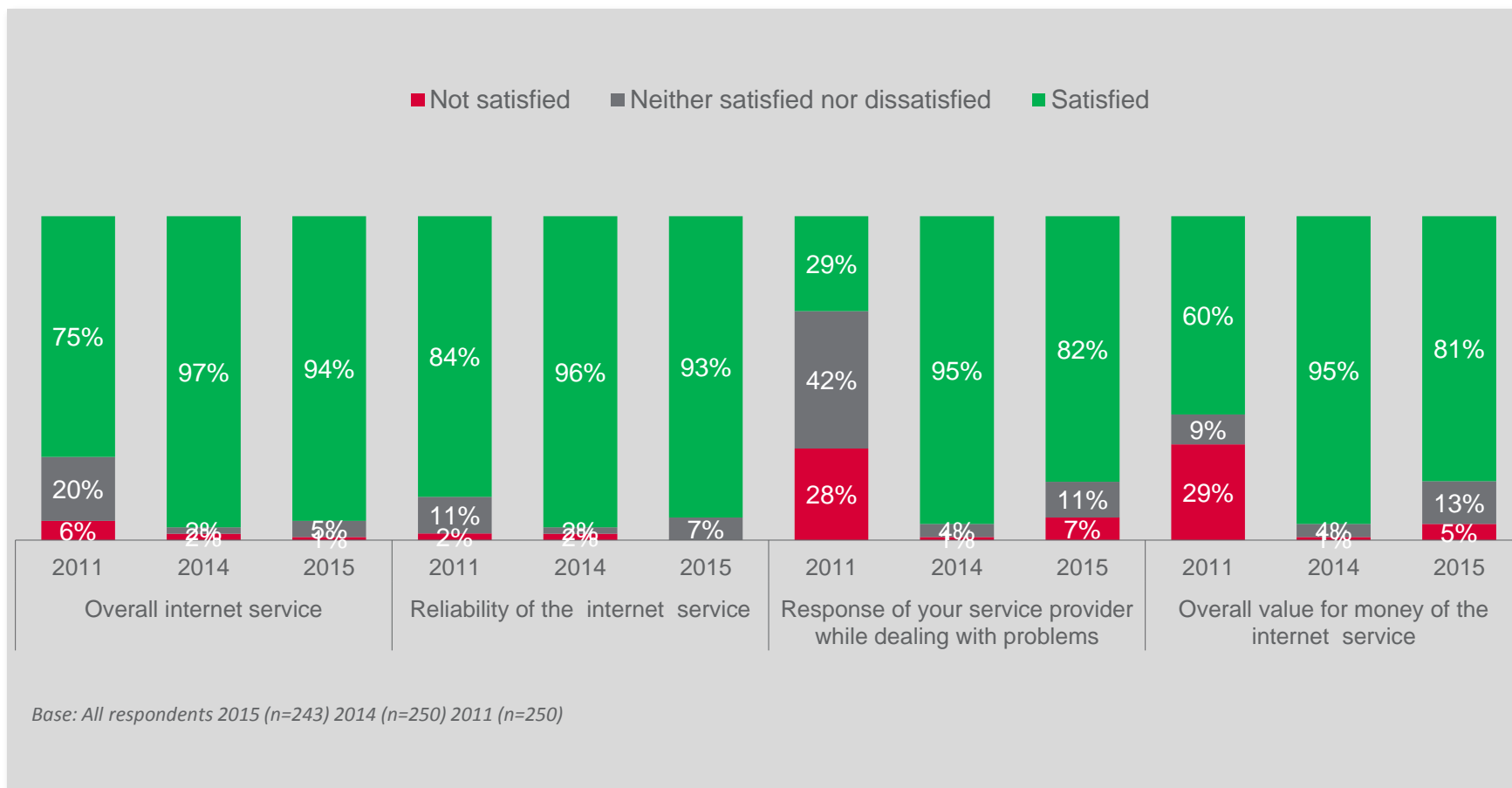
INTERNET ACTIVITIES

- Overall, the proportion of businesses engaging in internet related activities has grown compared to 2011.
- Getting information from general government organizations has increased significantly from 44% in 2011 to 73% in 2015.



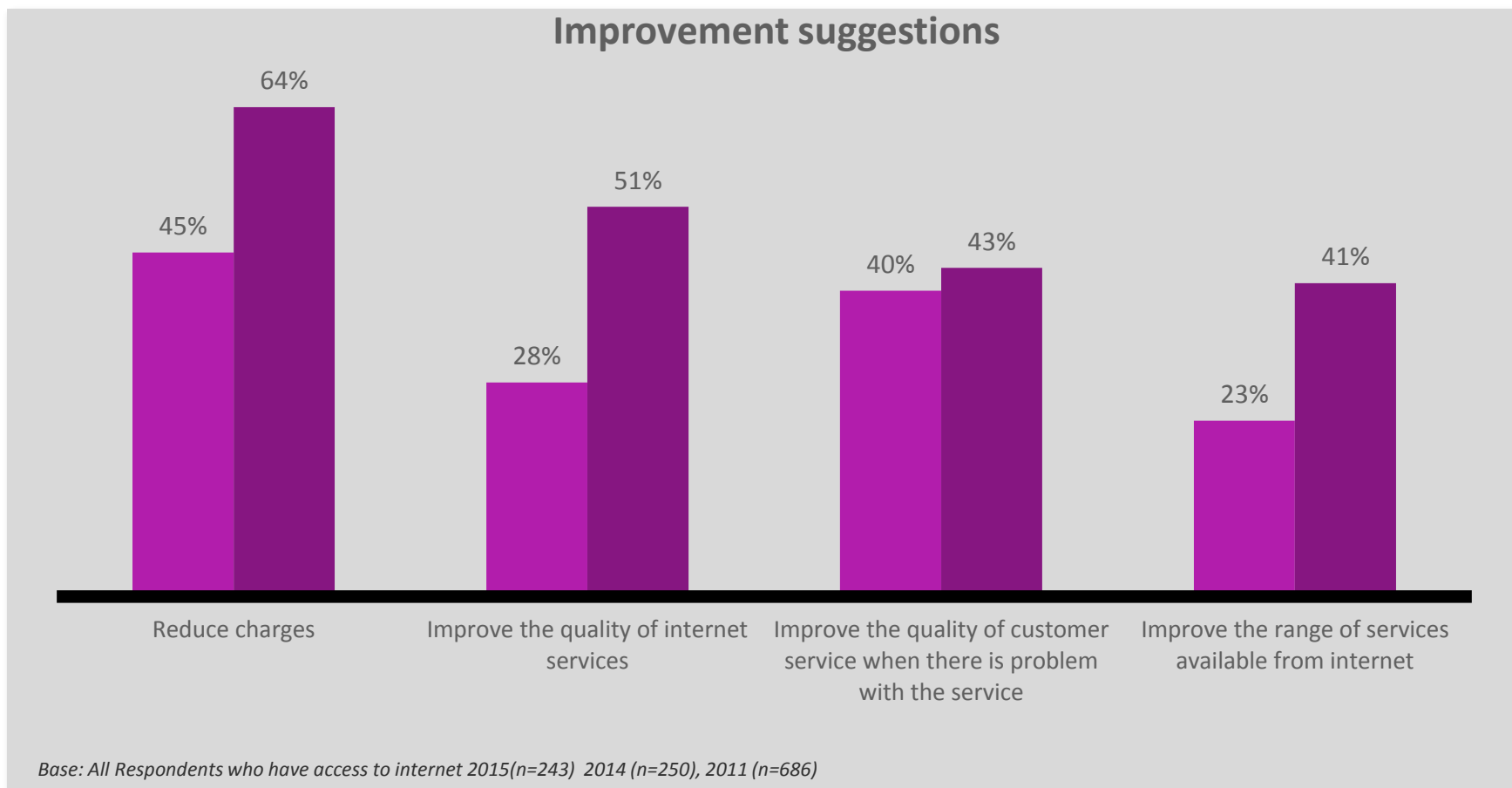
SATISFACTION WITH INTERNET SERVICE

- In 2015 more than 90% of businesses are satisfied with their overall internet service, reliability of the internet service, response of their service provider while dealing with problems and overall value for money of the internet service.



IMPROVEMENT SUGGESTIONS FOR INTERNET SERVICE

- Reducing charges/tariffs (64%) and Improving quality of internet services (51%) are the top suggestions for improvement of internet service in 2015.



APPENDIX

RESEARCH DESIGN

Target Respondent

- Responsible for telecoms needs in the organization (Decision makers or Influencers).
- Following sectors were included in research:
 - Agriculture, hunting and forestry
 - Manufacturing
 - Construction
 - Wholesale and retail trade; repair of motor vehicles, motorcycles and personal and household goods
 - Hotels and restaurants
 - Transport, storage and communications
 - Financial intermediation
 - Health and social work
 - Other community, social and personal service activities

Research Methodology

- **253 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: June/July 2015.

SAMPLE PROFILE – INDUSTRY-WISE

NUMBER OF EMPLOYEES	SAMPLE SIZE			
	2015	2014	2011	2007
Wholesale & Retail	65	71	85	25
Construction	44	44	37	23
Manufacturing	38	37	32	21
Real Estate	11	25	21	
Govt. Org.	15		19	
Other (Social & Personal Services)	4	9	15	
Hotels and restaurants	22	22	13	32
Transport, IT & Communication	12	11	7	6
Fishing			6	
Financial intermediation	29	23	5	
Education			3	
Health and social work	11	10	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	2			14
Others			1	
TOTAL ESTABLISHMENTS	253	252	250	159

RESPONDENT PROFILE – COMPANY SIZE

