



Q1 2019

Quarterly Market Indicators

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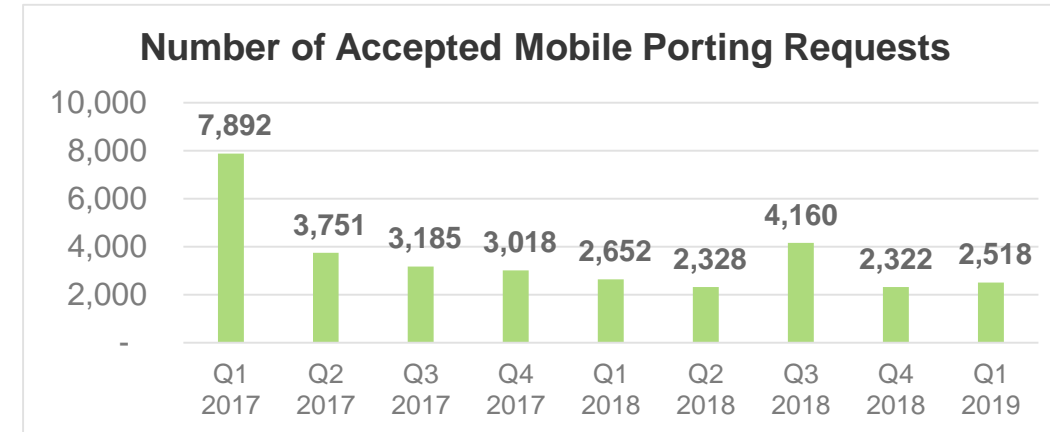
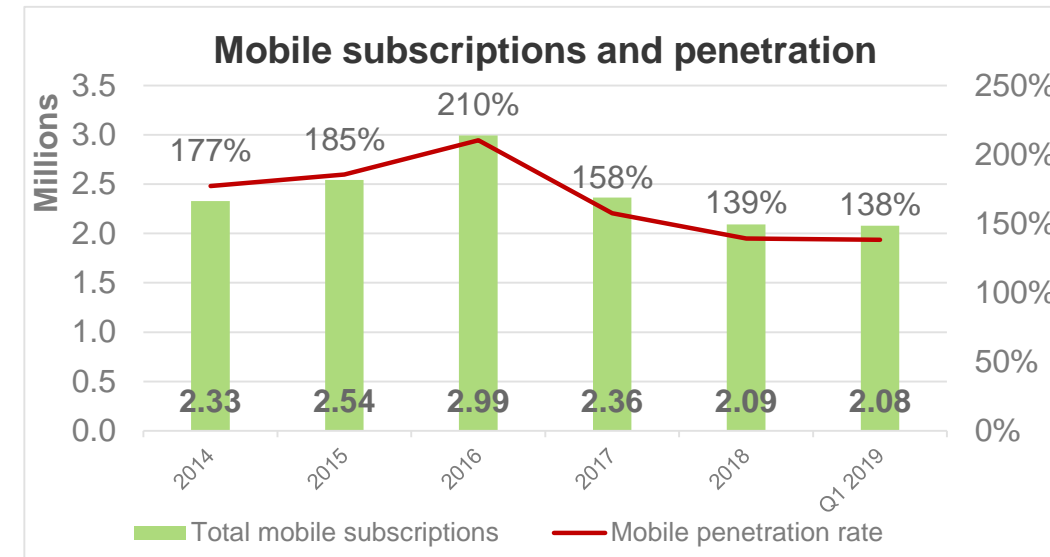
Mobile services: Subscriptions

- In the beginning of **2019**, Mobile subscription continue to decline but with a slower rate. Between **Q4 2018** and **Q1 2019** mobile subscriptions declined by only **1%**.
- Mobile penetration rate is stable at **138%**.
- Percentage of Postpaid numbers continued to increase reaching to 31% by **Q1 2019** or an increase of around **5,000** subscribers between end of **2018** and **Q1 2019**. For the same period, Prepaid subscribers declined by **18,096** subscribers.

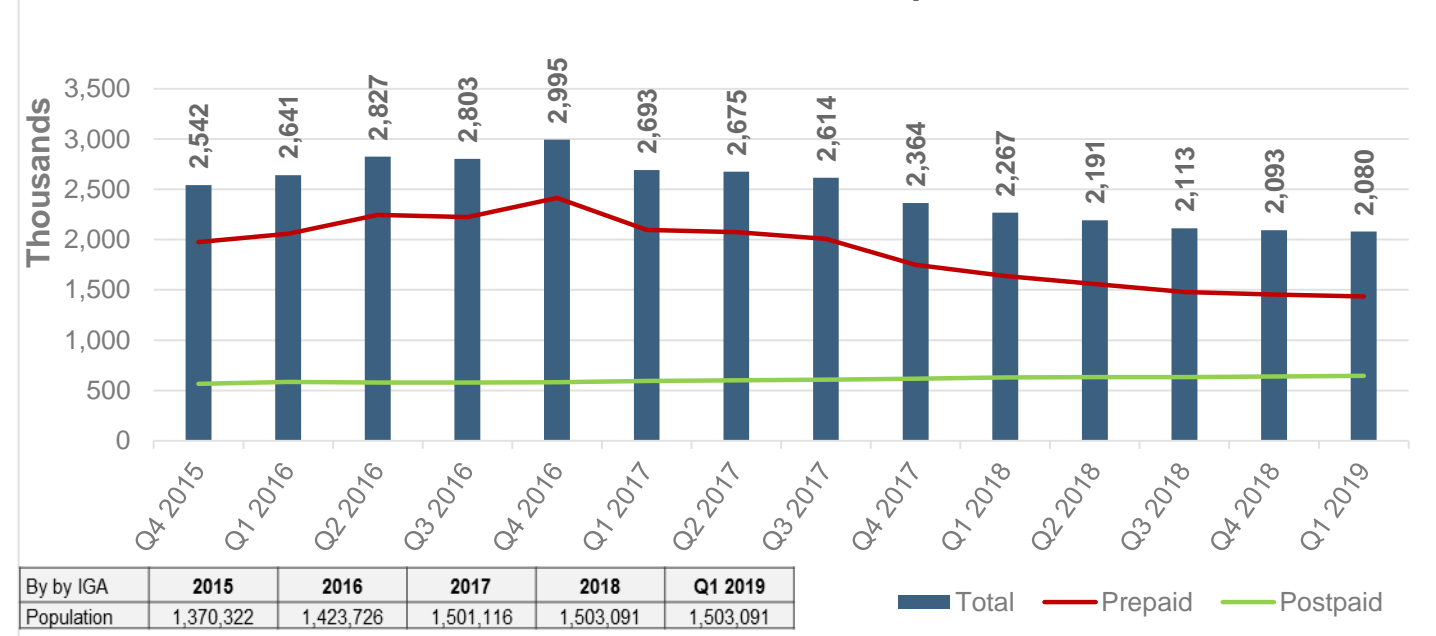


Number of Mobile subscriptions (End of Q1 2019)
2,079,751 Subscribers
 138% Penetration rate

	2016	2017	2018	Q1 2019
Total	2,994,865	2,364,477	2,092,714	2,079,751
% of Prepaid	80.60%	73.94%	69.46%	69.02%
% of Postpaid	19.40%	26.06%	30.54%	30.98%



Number of mobile subscriptions

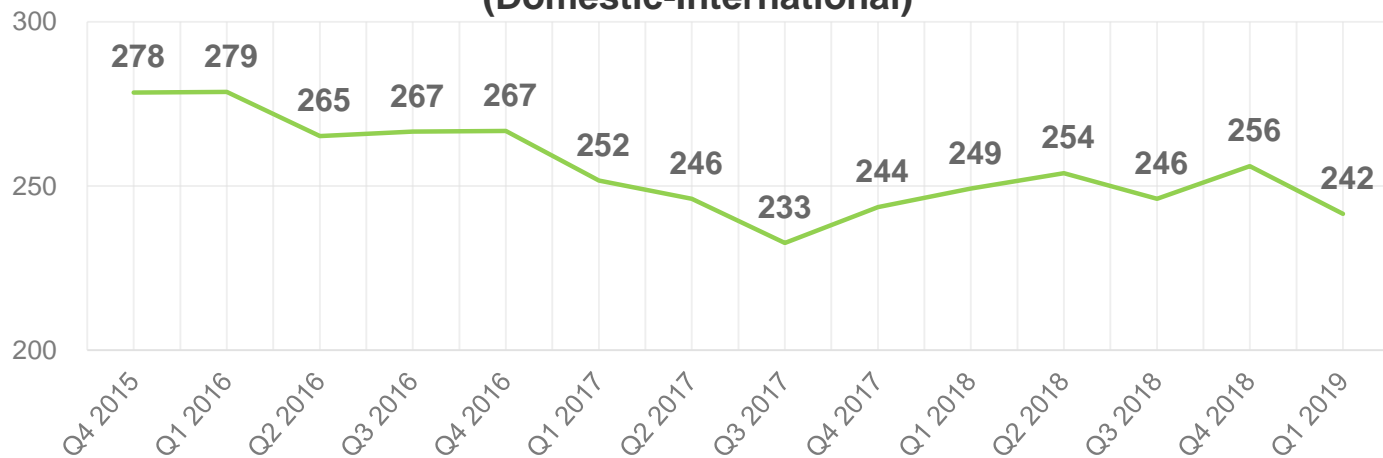


By by IGA	2015	2016	2017	2018	Q1 2019
Population	1,370,322	1,423,726	1,501,116	1,503,091	1,503,091

Mobile services: Traffic (Minutes)

- The declining trend of mobile outgoing minutes is continuing with a decrease of **12.4%** between Q1 2019 and Q1 2018. Between Q1 2019 and Q4 2018 outgoing minutes declined by around **6%**.
- Most of the decrease in outgoing minutes is due to the decrease in domestic traffic where year-on-year domestic traffic declined by **13.55%** while international traffic for the same period declined by **9.44%**.
- For the first time, Postpaid mobile traffic is more than Prepaid mobile traffic reaching to **50.6%** of the total domestic traffic.
- Average Monthly minutes per user decreased by **6%**. Average domestic minutes declined to 173 from 186 and International minutes declined from 70 to 69.

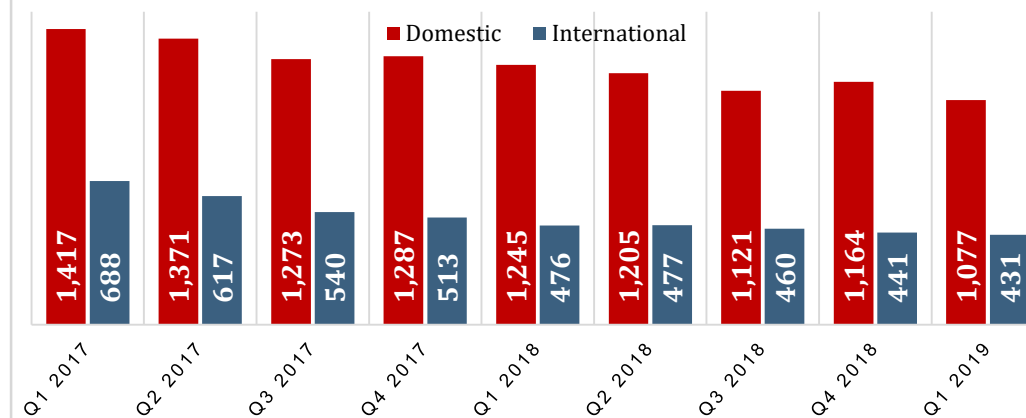
Average Monthly Minutes Per User (Domestic-International)



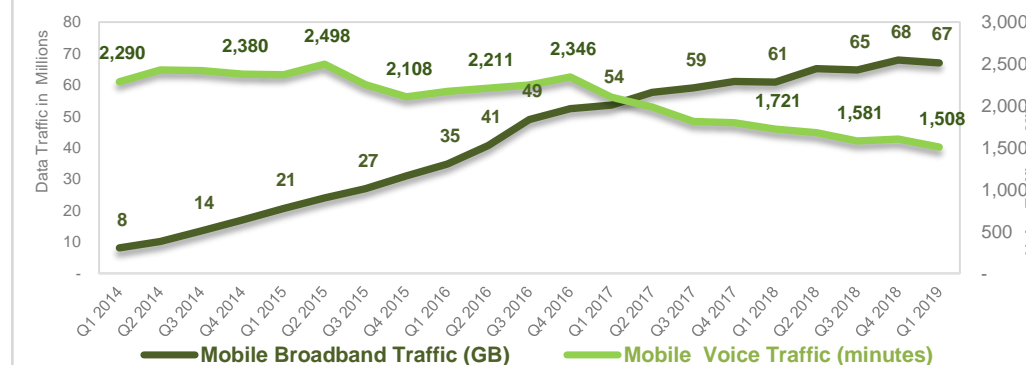
Total Outgoing Traffic in Minutes (Domestic + International)

Q1 2018	Q1 2019	Change
1,721,108,280	1,507,516,335	12.4% ▼

Total Outgoing Mobile Voice Traffic In Millions Of Minutes (Domestic-international)

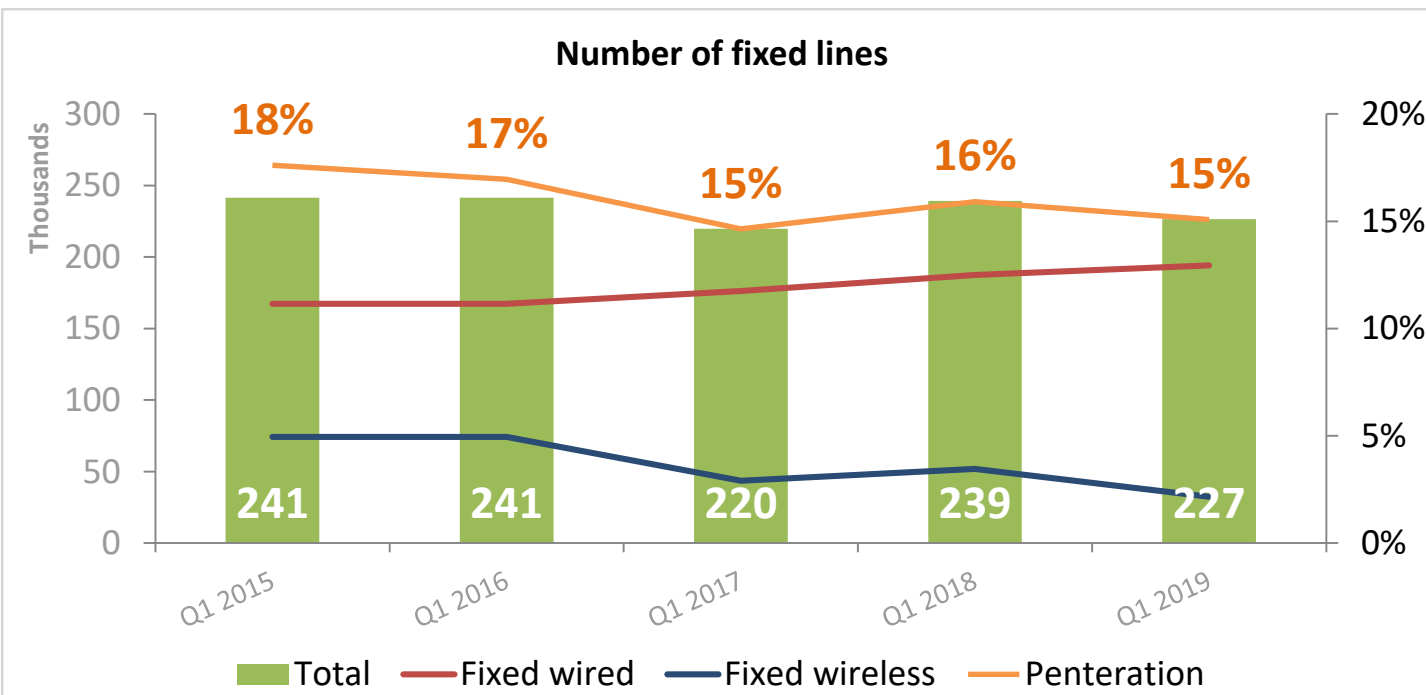


Mobile Voice Traffic Vs Mobile Broadband Data Traffic



Fixed telephony services: Subscriptions (PSTN & Wireless)

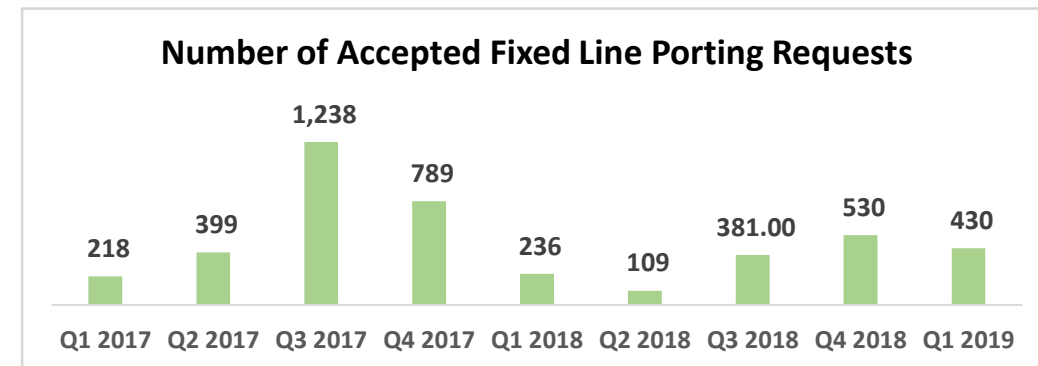
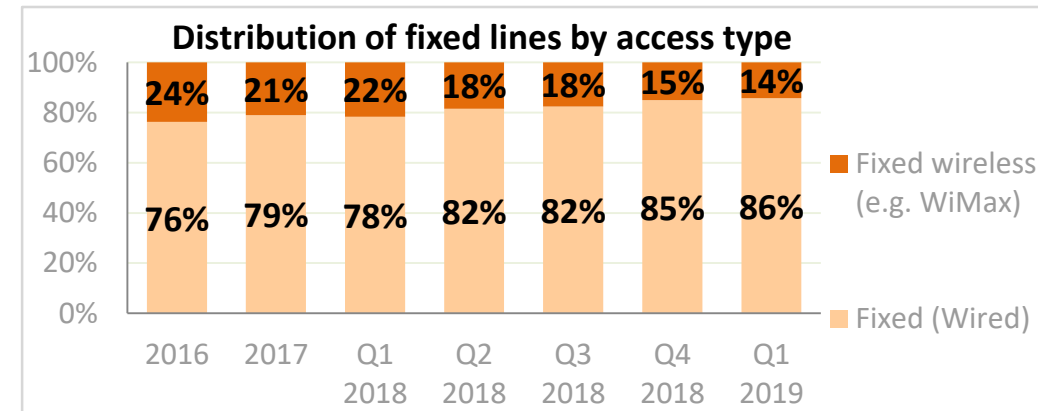
- While total number of fixed lines decreased by **5%** between Q1 2018 and Q1 2019, Fixed wired lines increased by **3.6%** and Fixed wireless decreased by **37.6%**.
- The drop in Fixed wireless subscribers is due to switching of customers broadband from a WiMax technology to Mobile technology.



No. of fixed telephony subscriptions

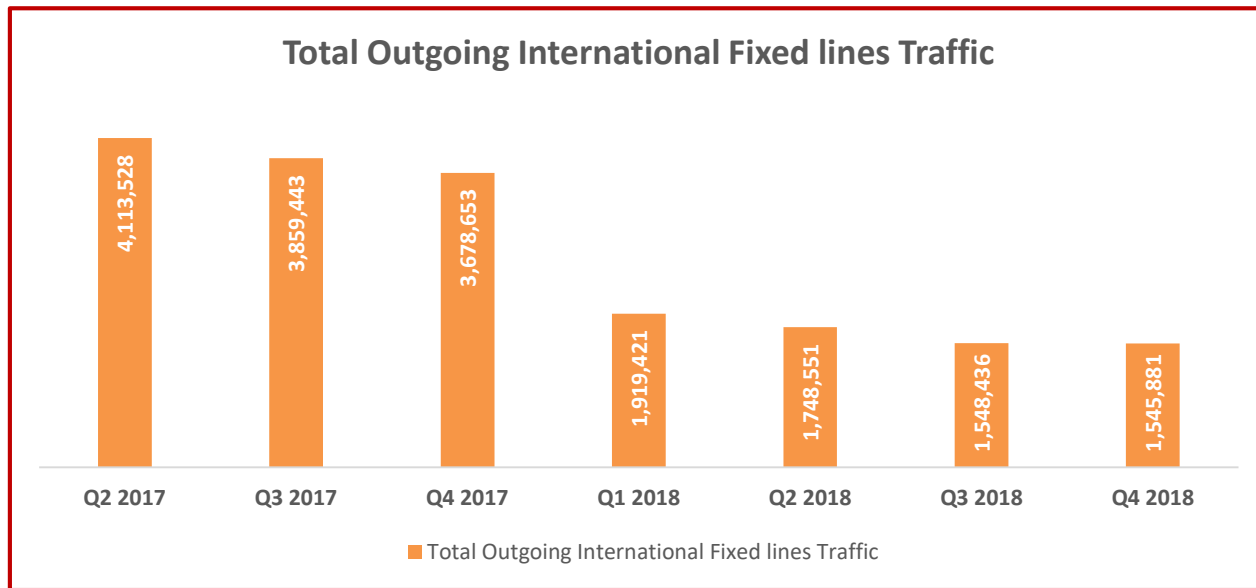
End of Q1 2018	End of Q1 2019
239,271	226,571
16% Penetration rate	15% Penetration rate

	2016	2017	2018	Q1 2019
Total	233,917	234,709	225,479	226,571
% of Fixed Wired	76.26%	79.01%	84.91%	85.71%
% of Fixed Wireless	23.74%	20.99%	15.09%	14.29%



Fixed telephony services: Traffic (PSTN & Wireless - Minutes)

- Although comparing Q1 2018/2019 shows a slight increase of traffic by **1.5%**, traffic declined between Q4 2018 and Q1 2019 by **8.2%**.
- Comparing between Q1 2018/2019, Average domestic outgoing minutes have increased by 8 minutes or by **6%**.

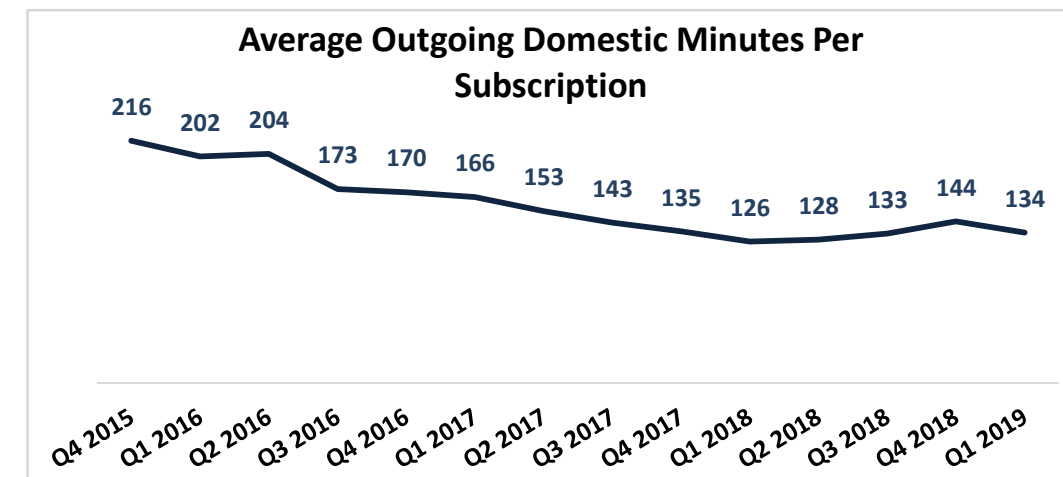
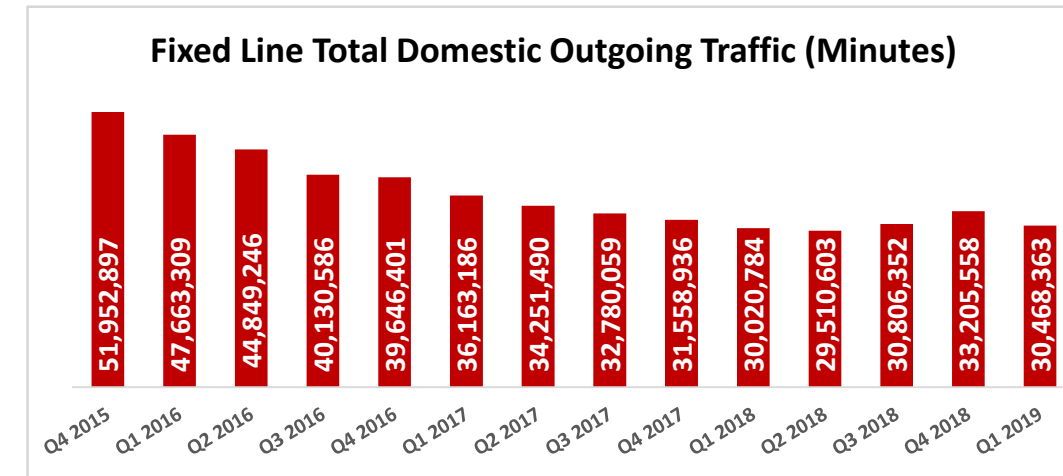


* International Outgoing Minutes originated from ISDN traffic is not included in the chart above



Total fixed domestic outgoing traffic in minutes

Q1 2018	Q1 2019	% Change
30,020,748	30,468,363	1.5%

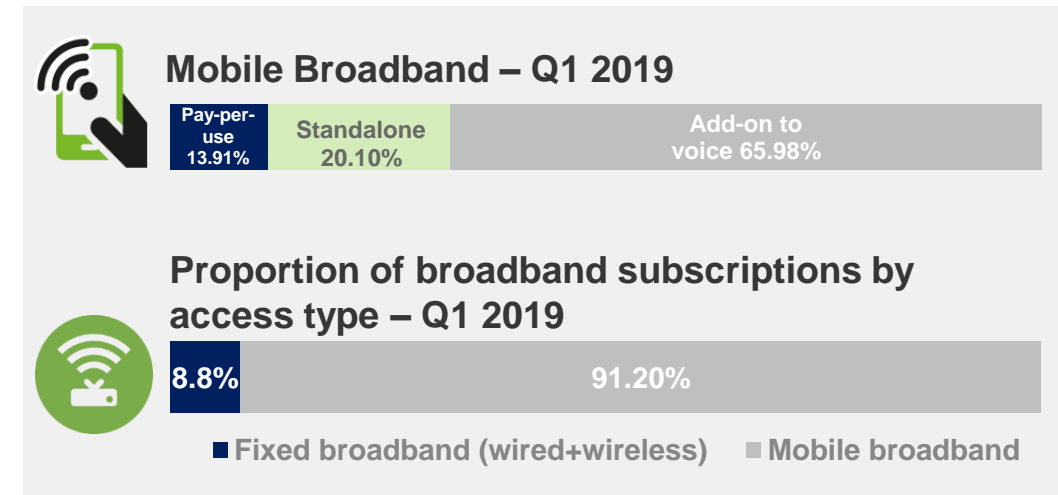
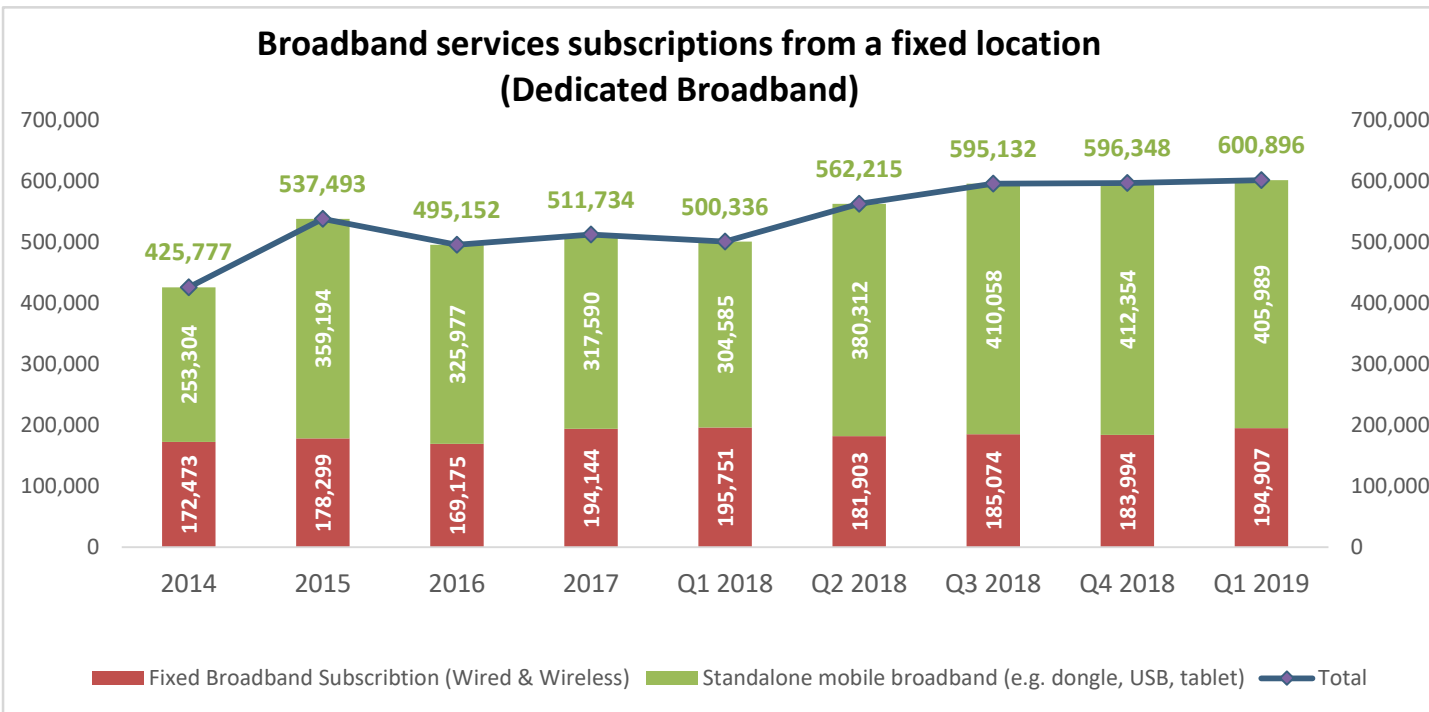
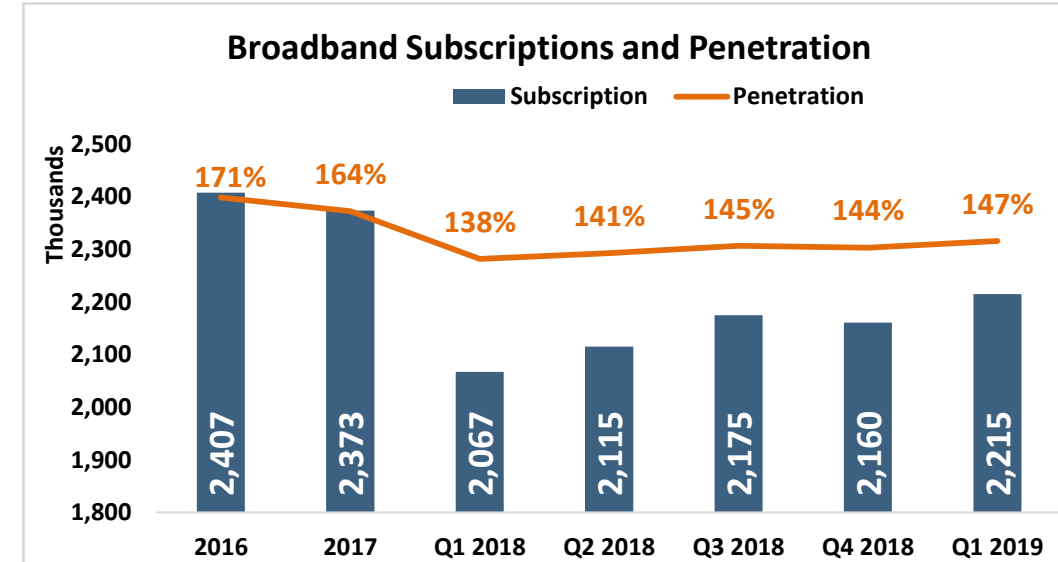


Broadband services: Subscriptions

- Broadband penetration reached 147%, this increase is due to the increase in number of broadband subscribers beginning from 2018 up to Q1 2019.
- From Q1 2018 to Q1 2019, broadband subscribers increased by **147,586** subscribers or a **7%** increase.
- Dedicated broadband subscribers are the main driver for the total increase. Between Q1 2018/2019 where the total increase in dedicated broadband subscribers is **100,560**, or a **20%** increase.



No. of broadband subscriptions (End of Q1 2019)
2,214,794
 147% Penetration rate



Broadband services: Data Traffic*

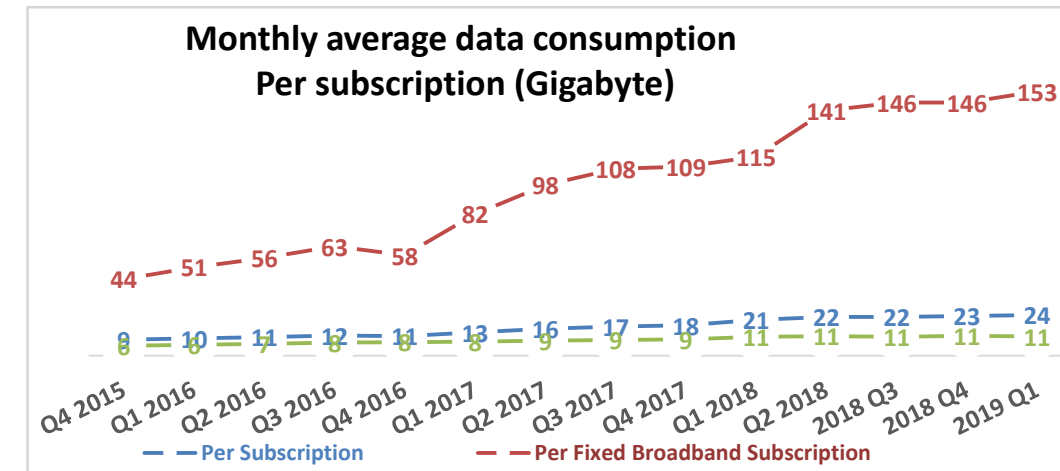
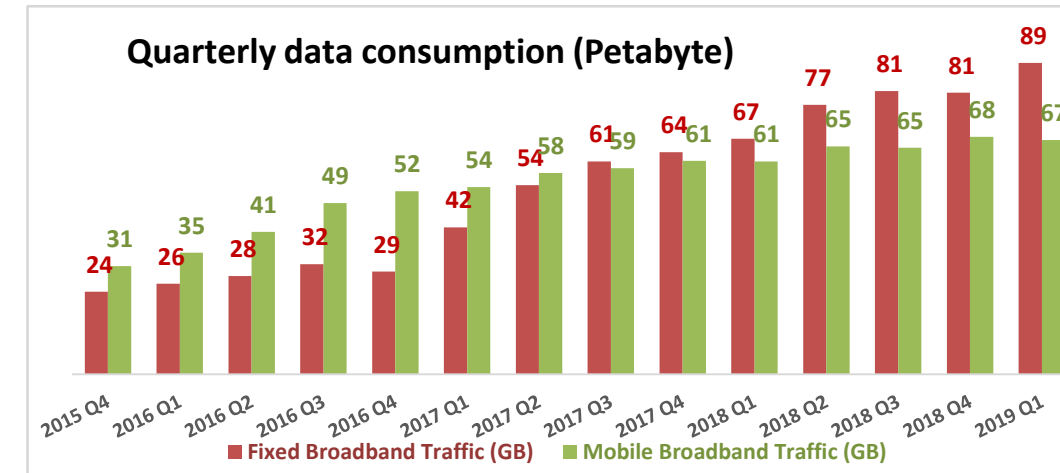
- The upward trend in data consumption is continuing to grow as data traffic reached 156 PB in Q1 2019, an increase of **22%** over the year from Q1 2018.
- Year-on-Year, Mobile broadband traffic has increased by **10%** while Fixed broadband traffic has increased by **32.3%**.
- The monthly average mobile broadband traffic per mobile subscription remained at 11 GB compared to the monthly average fixed broadband traffic per fixed subscription which increased to **153 GB** a year-on-year increase of **32.8%**.
- Overall, the monthly average traffic per user stands at 24 GB as of Q1 2019, which shows an increase of **13.6%** compared to Q1 2018.

* The OLO's traffic (data usage) is estimated for 2018



Total data traffic in Gigabyte***

Q1 2018	Q1 2019	
128,408,578	156,260,029	▲ 22%



Definitions

Indicator	Definition
Fixed-telephone subscriptions	Fixed-telephone subscriptions refers to the sum of active number of analogue fixed-telephone lines, voice-over-IP (VoIP) subscriptions, fixed wireless local loop (WLL) subscriptions.
Prepaid mobile subscribers	Prepaid mobile-cellular telephone subscriptions (ITU code i271p) Refers to the total number of mobile-cellular telephone subscriptions that use prepaid refills. These are subscriptions where, instead of paying an ongoing monthly fee, users purchase blocks of usage time. Only active subscriptions should be included (those used at least once in the last three months for making or receiving a call or carrying out a non-voice activity such as sending or reading an SMS or accessing the Internet).
Postpaid mobile subscribers	Postpaid mobile-cellular telephone subscriptions Refers to the total number of mobile-cellular subscriptions where subscribers are billed after their use of mobile services, at the end of each month. The postpaid service is provided on the basis of a prior arrangement with a mobile cellular operator. Typically, the subscriber's contract specifies a limit or allowance of minutes, text messages, etc. The subscriber will be billed at a flat rate for any usage equal to or less than that allowance. Any usage above that limit incurs extra charges. Theoretically, a subscriber in this situation has no limit on use of mobile services and, as a consequence, unlimited credit.
Active mobile-broadband subscriptions	<p>Active mobile-broadband subscriptions refers to the sum of standard mobile-broadband and dedicated mobile broadband subscriptions to the public Internet. It covers actual subscribers, not potential subscribers, even though the latter may have broadband enabled-handsets. The indicator can be further broken down into:</p> <p>Standard mobile-broadband subscriptions (ITU code i271mb_active): Refers to active mobile-cellular subscriptions with an advertised data speed of 256 kbit/s or greater that allow access to the greater Internet via HTTP and have been used to make a data connection using Internet protocol (IP) in the previous three months. Standard SMS and MMS messaging do not count as active Internet data connections, even if they are delivered via IP.</p> <p>This includes mobile subscriptions that use mobile-broadband services on a pay-per-use basis. It excludes mobile subscriptions with a separate monthly data plan for mobile-broadband access (see Indicator 25b, Dedicated mobile broadband subscriptions).</p> <p>Dedicated mobile-broadband subscriptions (ITU code i271md): Refers to subscriptions to dedicated data services (over a mobile network) that allow access to the greater Internet and that are purchased separately from voice services, either as a standalone service (e.g. using a data card such as a USB modem/dongle) or as an add-on data package to voice services that requires an additional subscription. All dedicated mobile-broadband subscriptions with recurring subscription fees are included as 'active data subscriptions' regardless of actual use. Prepaid mobile-broadband plans require use in the last three months if there is no monthly subscription. This indicator could also include mobile WiMAX subscriptions.</p>



THANK
YOU

5th Floor Bldg 436, Block 852,
Road No.3618,
Seef, Manama
PO Box 10353
Kingdom of Bahrain
Phone: 0000 1752

www.tra.org.bh