

Telecommunications Services Market Survey 2020

RESIDENTIAL STUDY

Nov 2021

KANTAR



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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.

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01

Objective & Sample Distribution

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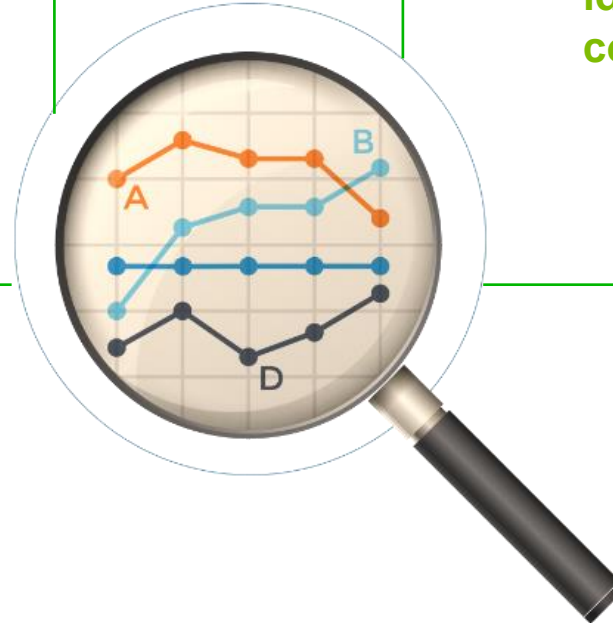


The main objectives of the telecommunications Services Market Survey are :

Access to and usage of telecommunications services

Give an indication of consumer satisfaction and assist in the identification of any issues of concern.

Identify any market failures and assist in its decisions to take appropriate regulatory action.

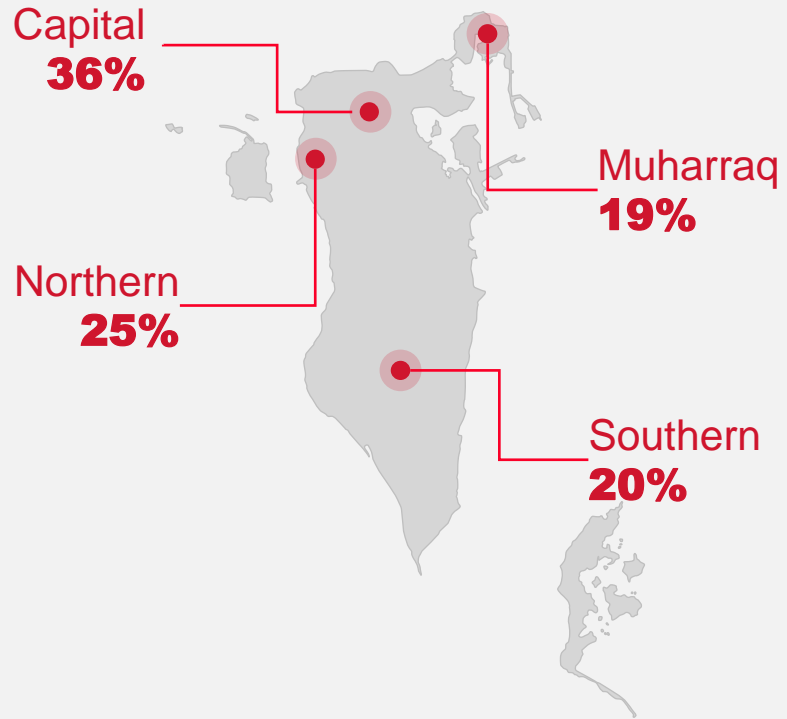


Identify the changes in consumer needs and find their new trends in terms of telecommunications usage.

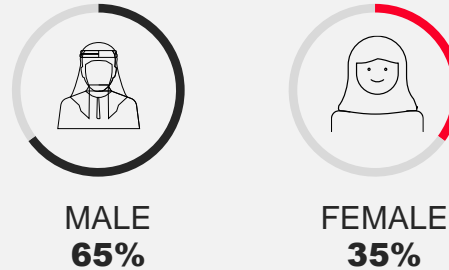
Survey Sample

1520 Telephonic interviews has been conducted among residents of Bahrain in 2020

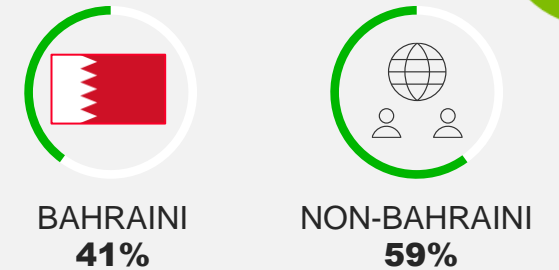
GOVERNORATES



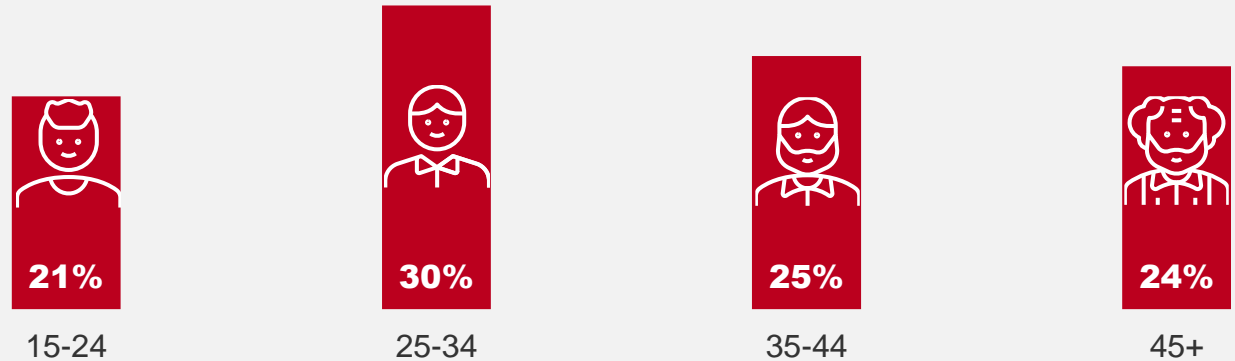
GENDER



NATIONALITY



AGE GROUP(%)



02

Summary of Findings

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KEY FINDINGS OF 2020 RESIDENTIAL SURVEY

FIXED LINE SERVICE



19% of respondents have fixed line services at home



80% of respondents are satisfied with Fixed Services

MOBILE SERVICES



100% Use Mobile services and all own smart phone

87% use mobile data to access internet



95% of respondents are satisfied with Fixed Services

INTERNET SERVICES



100% of respondents have access to internet



95% of respondents have used the internet daily in the last 3 months

45% of respondents purchase goods & services online



88% of respondents are satisfied with internet service

INTERNATIONAL CALLING SERVICES

71% prefer OTT App to make international calls.

25% prefer Mobile phone for International calling

03

Fixed Line Service

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FIXED LINE SERVICE

ACCESS



19%

Of respondents have fixed line services at home

SATISFACTION



80%

Of respondents are satisfied with their fixed line services

QUALITY & PRICE PERCEPTION



Price perception is slightly lower for international call.

Quality of customer service of fixed line is steady

AREAS OF IMPROVEMENT

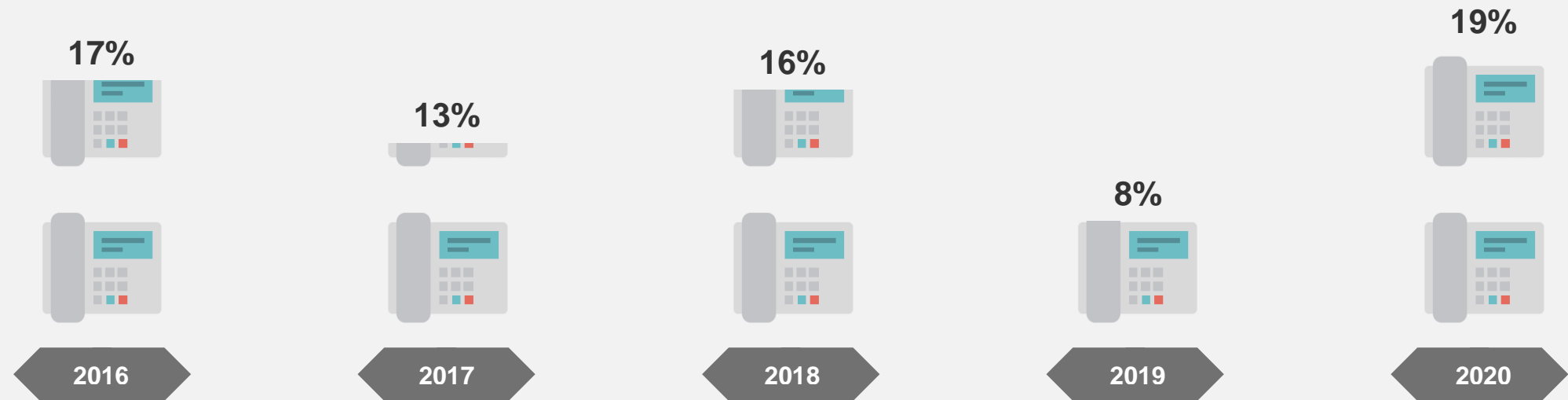


Residents would like to see reduced charges for fixed services

Access to fixed line service at home is at 19%.



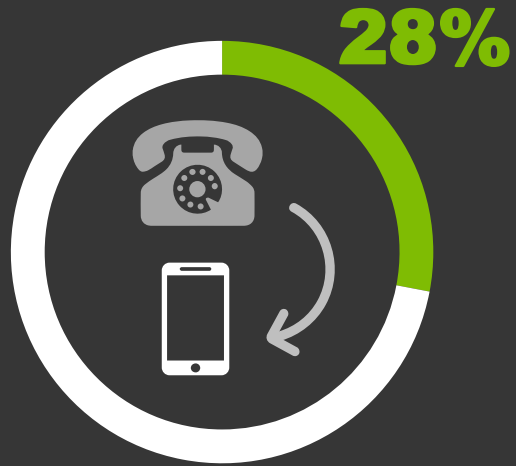
HOUSEHOLDS WITH FIXED LINE TELEPHONE



Base: All

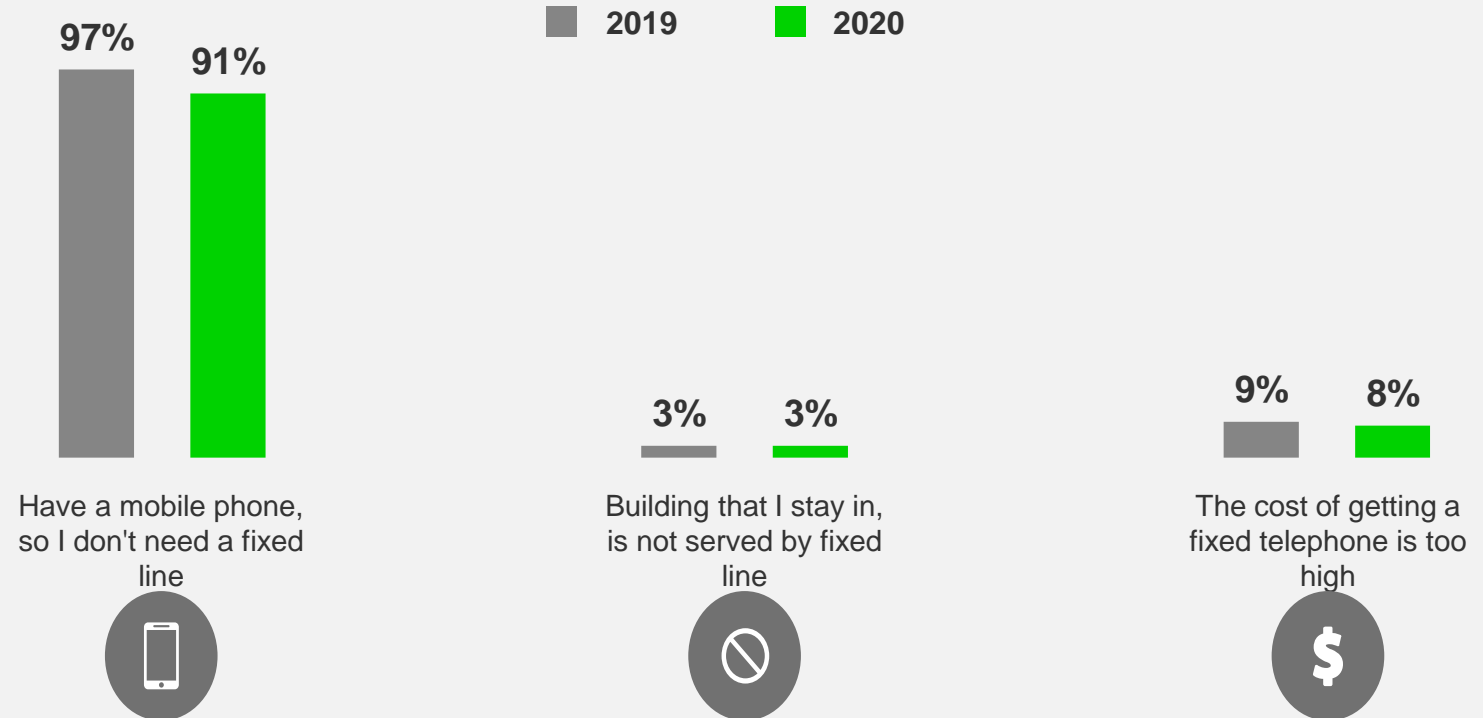
Access to mobile phone key reason for not having a fixed line telephone

REASON FOR NOT HAVING FIXED LINE CONNECTION



cancelled fixed line connection in the past and switched to mobile only

Base: All

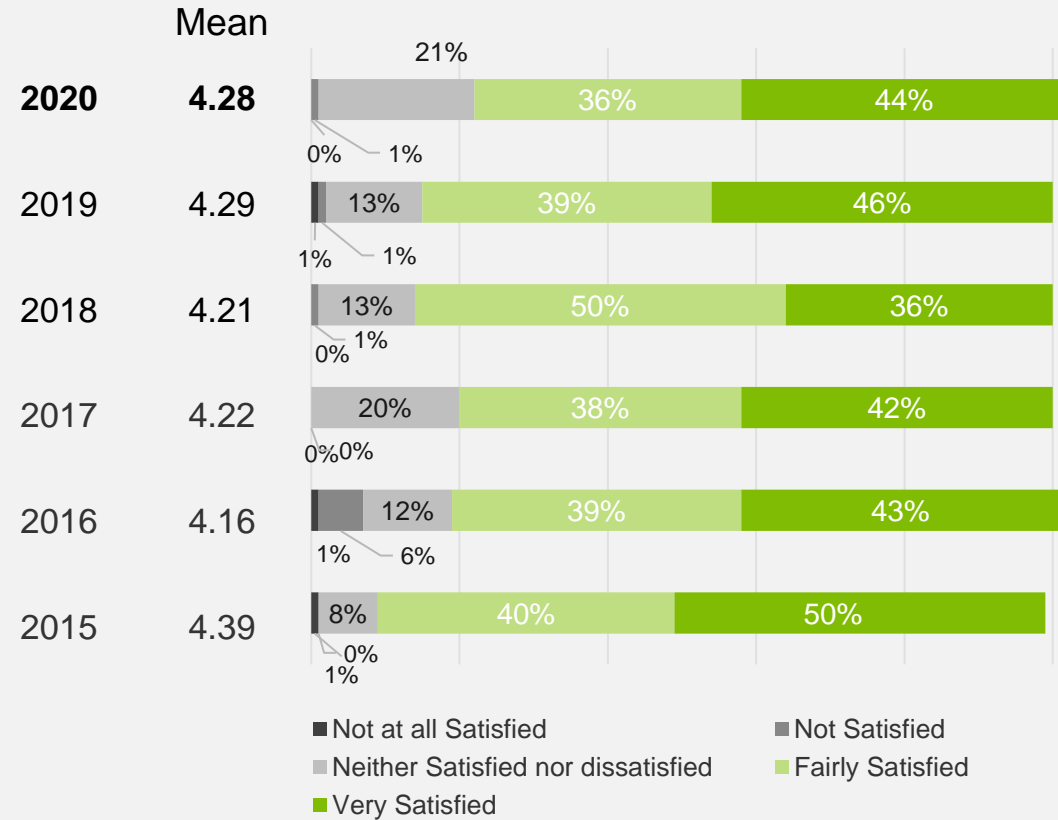


Base: Those who do not have a fixed line

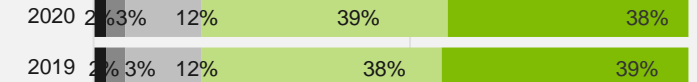
Satisfaction with Fixed Line service remains high among current users. Decrease in satisfaction with Pricing for International Calls

SATISFACTION WITH FIXED LINE SERVICES

Figures in % (except mean)



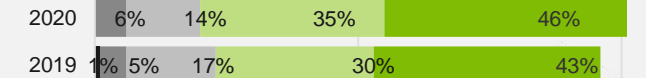
Price of national calls made from fixed line



Price of international calls made from fixed line



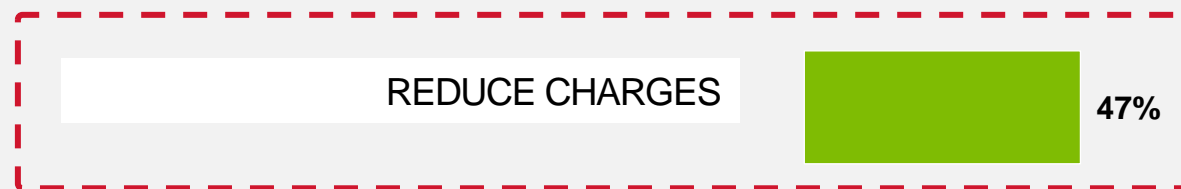
Quality of the customer services



Base: Current Users

For fixed line services, Pricing is the key improvement area

SUGGESTIONS TO IMPROVE FIXED LINE SERVICES



IMPROVE THE RANGE OF SERVICES

16%

IMPROVE THE QUALITY OF CUSTOMER SERVICE

16%

IMPROVE THE QUALITY OF OVERALL SERVICE

21%

Residents Suggested:

- More promotional offers
- Monthly international minutes
- Better Packages

Base: Those who have a fixed line

04

Mobile Services

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MOBILE SERVICES

MOBILE



100%

Use Mobile services and all own smart phone

INTERNATIONAL CALLS



59%

use Mobile to make International calls.

USE MOBILE DATA



87%

use mobile data to access internet

SWITCHING PROVIDERS



10%

switched their mobile phone provider in last 12 months.

Primary reason being to get good VFM (Discounts and Promotions)

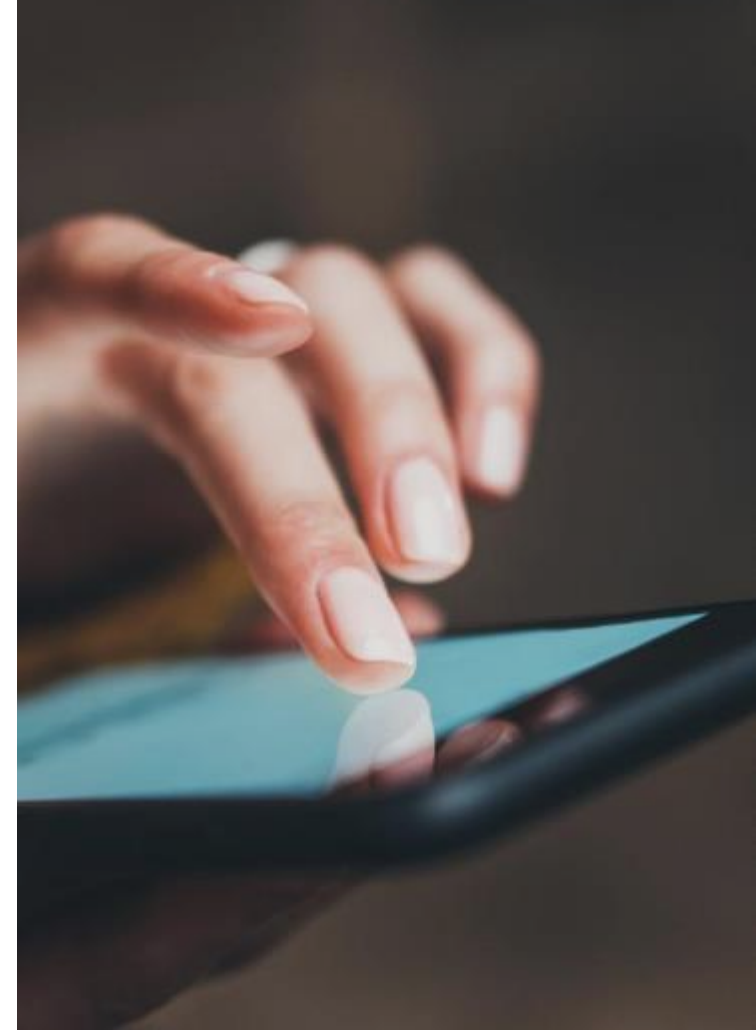
SATISFACTION



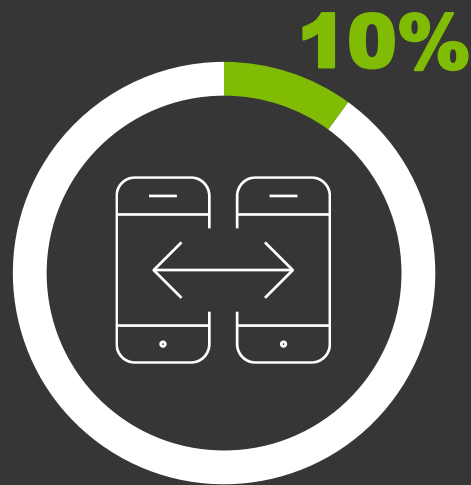
95%

Customers are Satisfied with Mobile services.

Network quality and connectivity rated high vs. last year



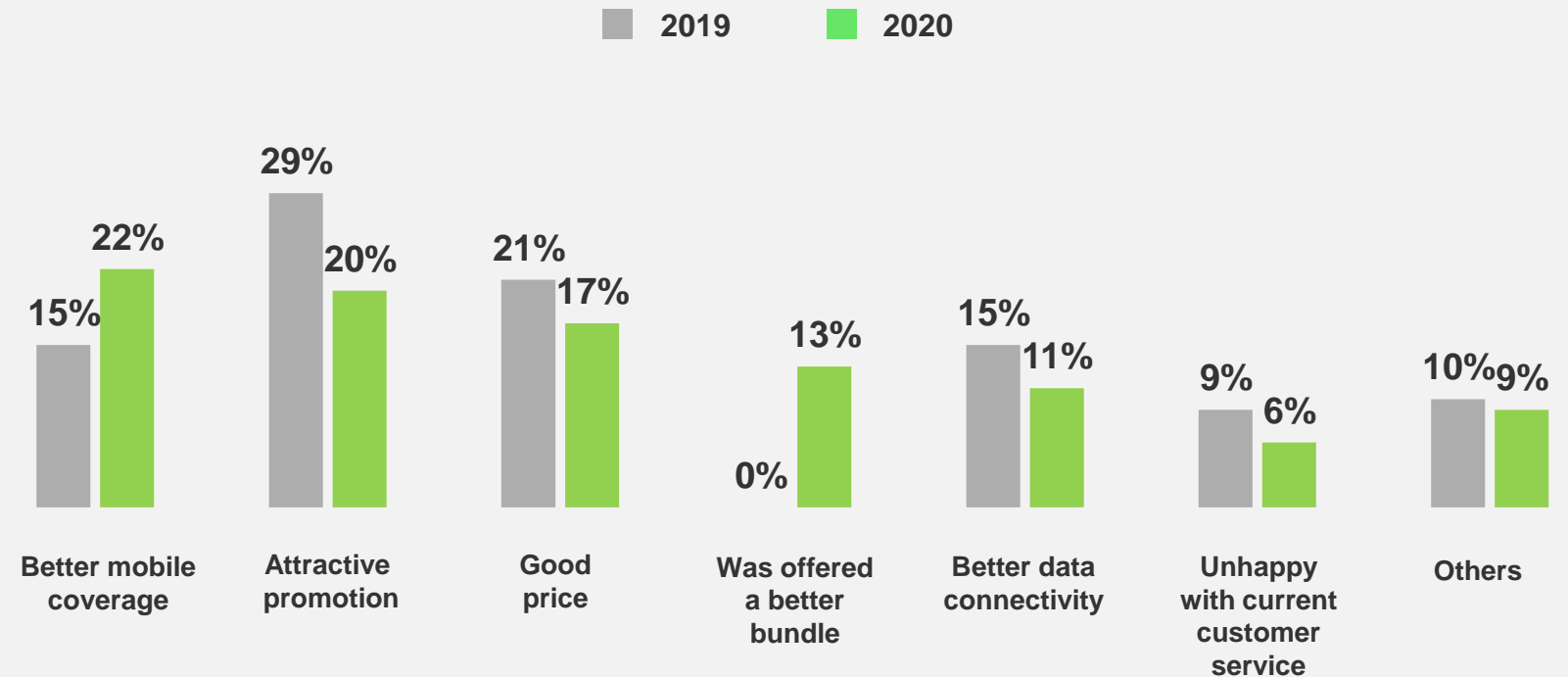
Better coverage, promotion & pricing driving switching between mobile service provider



Switched Mobile Service Provider in the last 12 months

Base: All

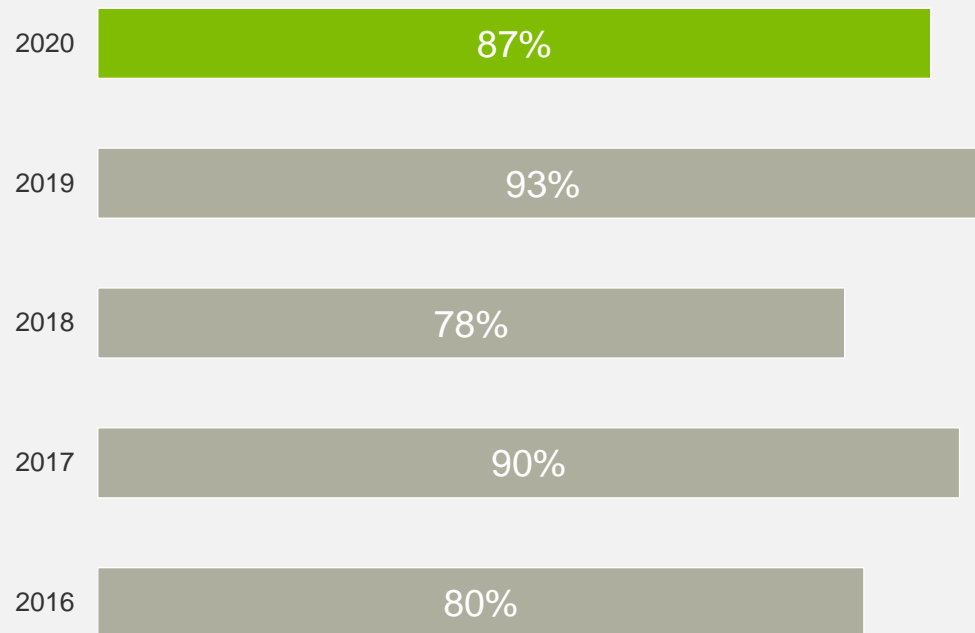
REASON FOR SWITCHING MOBILE PROVIDER



Base: Those who switched

Usage of Mobile Data remains high at 87%. Satisfaction too remains high with Mobile Data Connectivity with 51% very satisfied with data connectivity.

MOBILE DATA TO ACCESS INTERNET



Base: All respondents

SATISFACTION WITH MOBILE DATA CONNECTIVITY



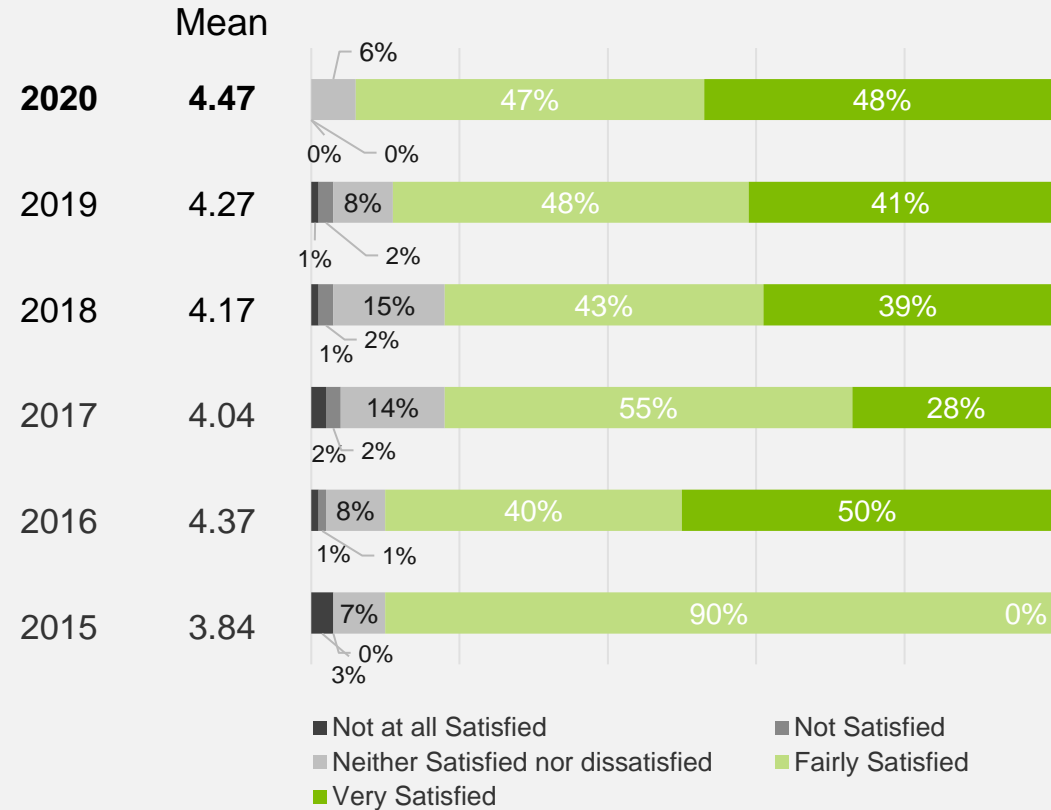
MOBILE DATA CONNECTIVITY	2020*	2019	2018
Very Satisfied %	51%	38%	29%
Mean Score	4.26	4.15	4.06



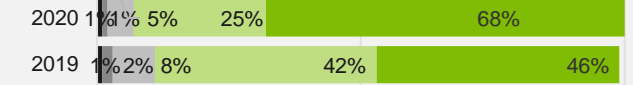
Satisfaction with mobile services improved primarily due to network quality and with transparency in offers

SATISFACTION WITH MOBILE SERVICES

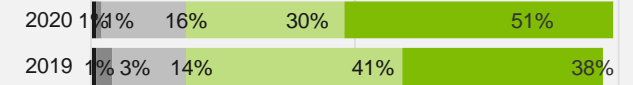
Figures in % (except mean)



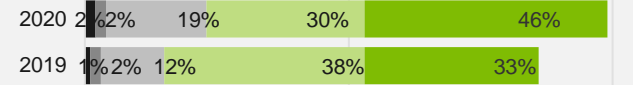
Voice quality when making local calls



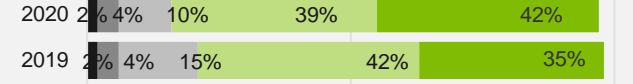
Mobile data connectivity



Voice quality when making international calls



Price of National Calls



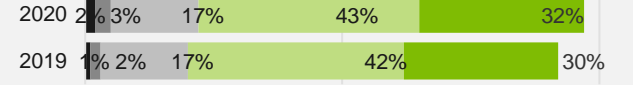
Price of Mobile Data



Price of International Calls made



Transparency and clarity of offers



Base: Current Users

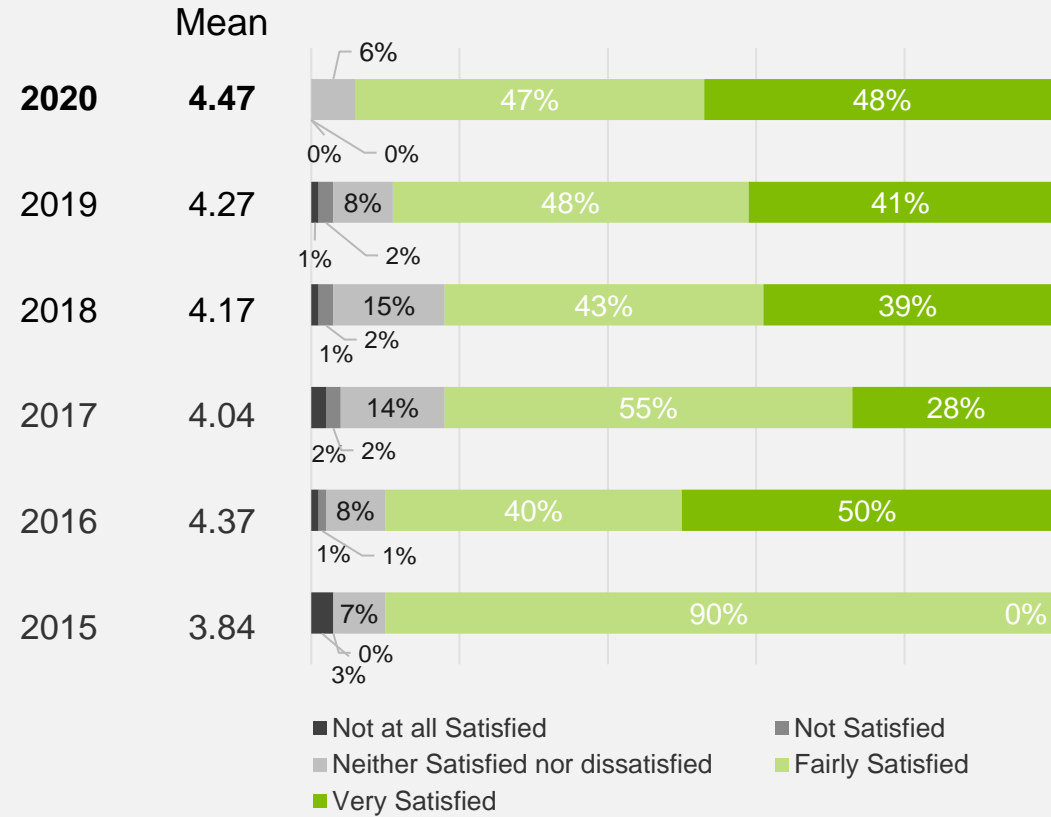
**Don't Know Mentions Not Shown. Will not add to 100%

*Calibrated scores to account methodology change

Customer services rated positive vs. 2019

SATISFACTION WITH MOBILE SERVICES

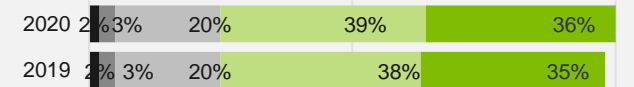
Figures in % (except mean)



Variety of mobile voice and data products (Tracked in 2020 only)



Quality of customer service



Base: Current Users

05

Internet Services

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INTERNET SERVICES

ACCESS



100%

have access to internet at home

USAGE



100%

have used the internet daily in the last 3 months.

eCommerce



45%

Purchase goods & services online with purchase frequency at highest level

SWITCHING



12%

switched their internet service provider in the last 12 months mainly due to quality and price perception to Mobile

SATISFACTION



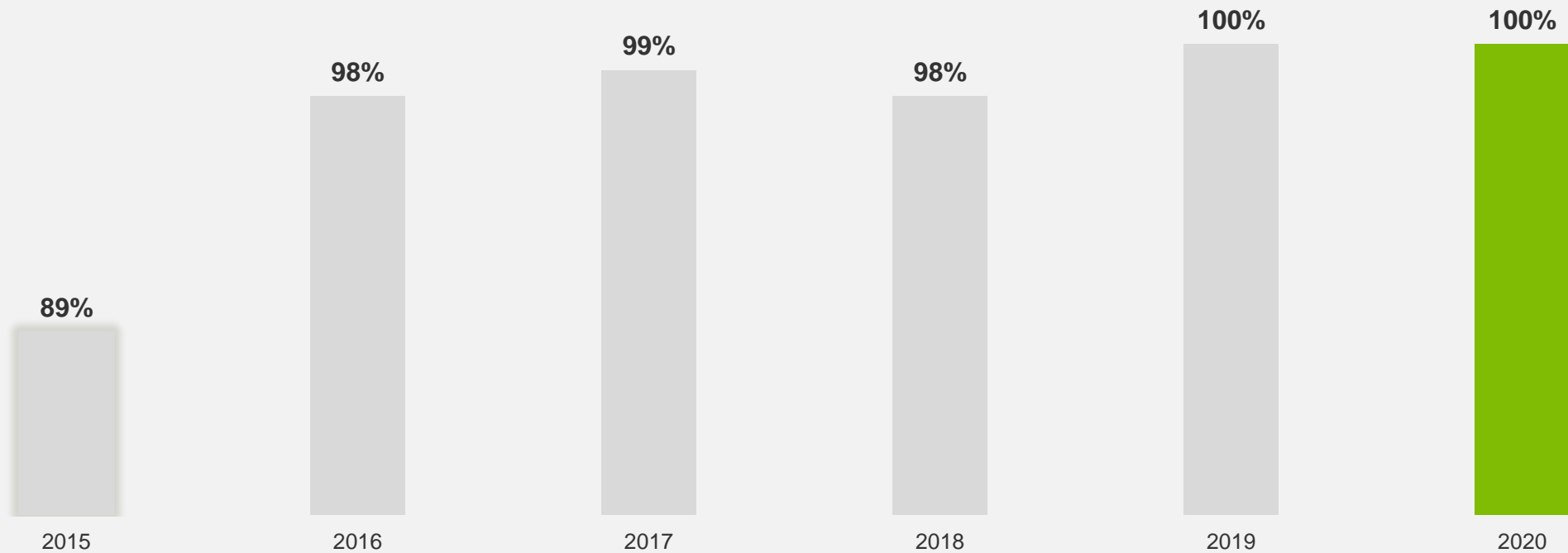
88%

Satisfied with service provided. However, rating on value for money has reduced



Universal accessibility of internet at home

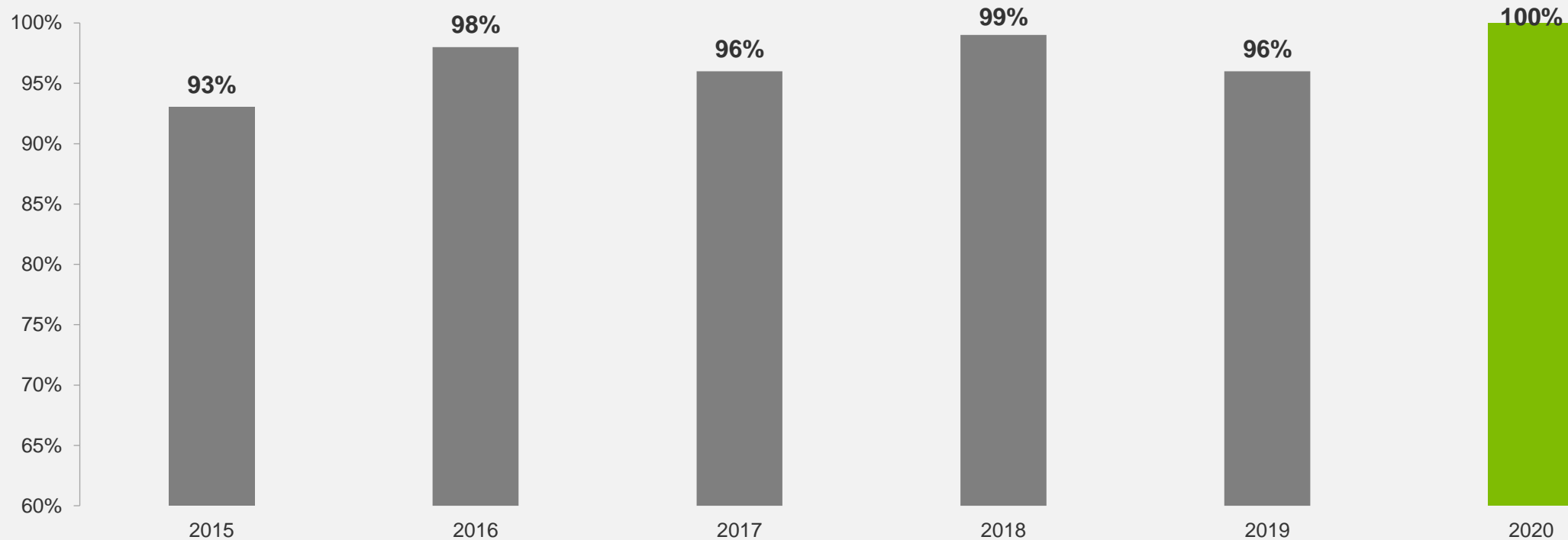
INTERNET ACCESS AT HOME



Base: All respondents

100% internet usage from any location in the last 3 months

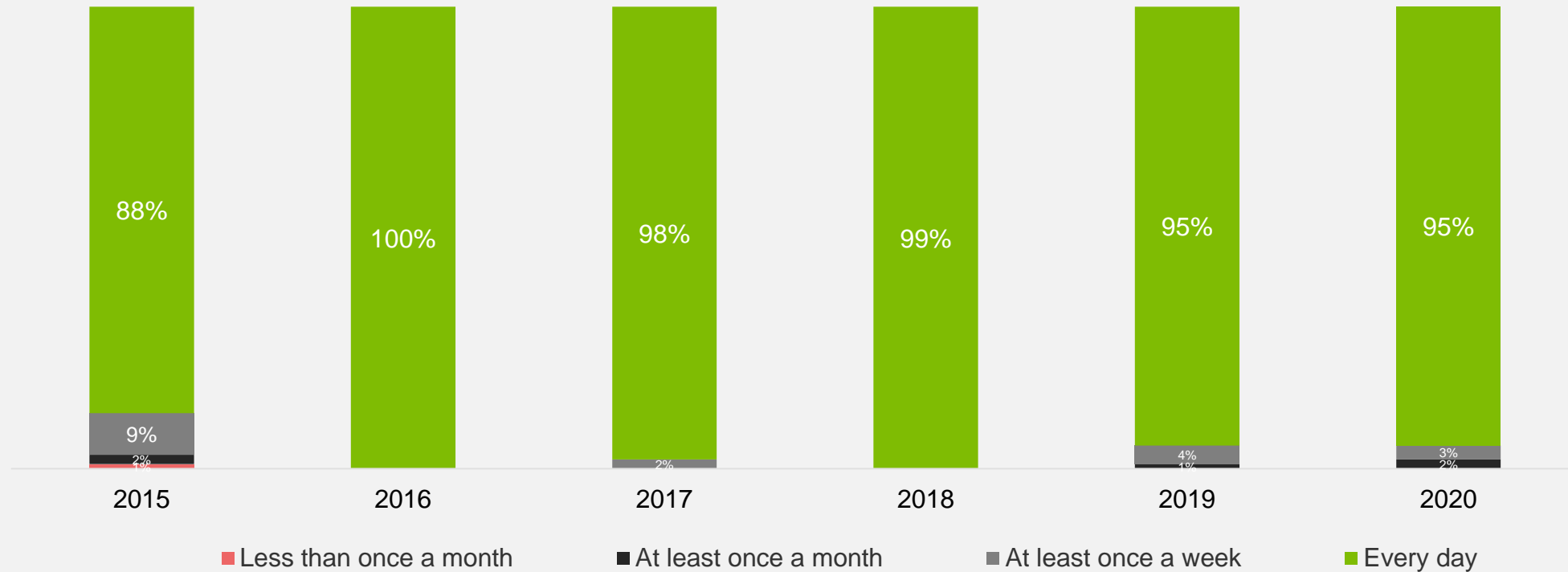
INTERNET USAGE IN LAST 3 MONTHS



Base: All respondents

95% accessing internet on daily basis in the last 3 months. And 100% within the last 1 month

USAGE FREQUENCY

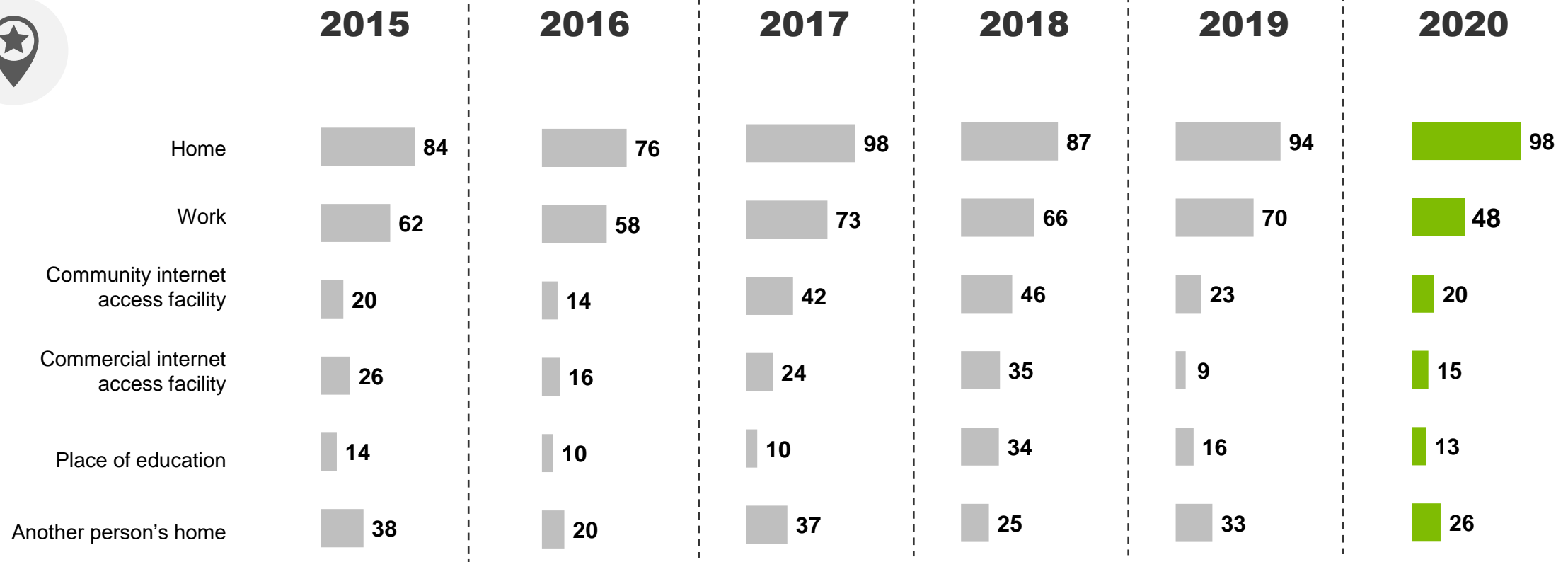


Base: All those used internet

Usage of internet home based. Work related access reduced significantly due to COVID.

Location of using internet in the last three months

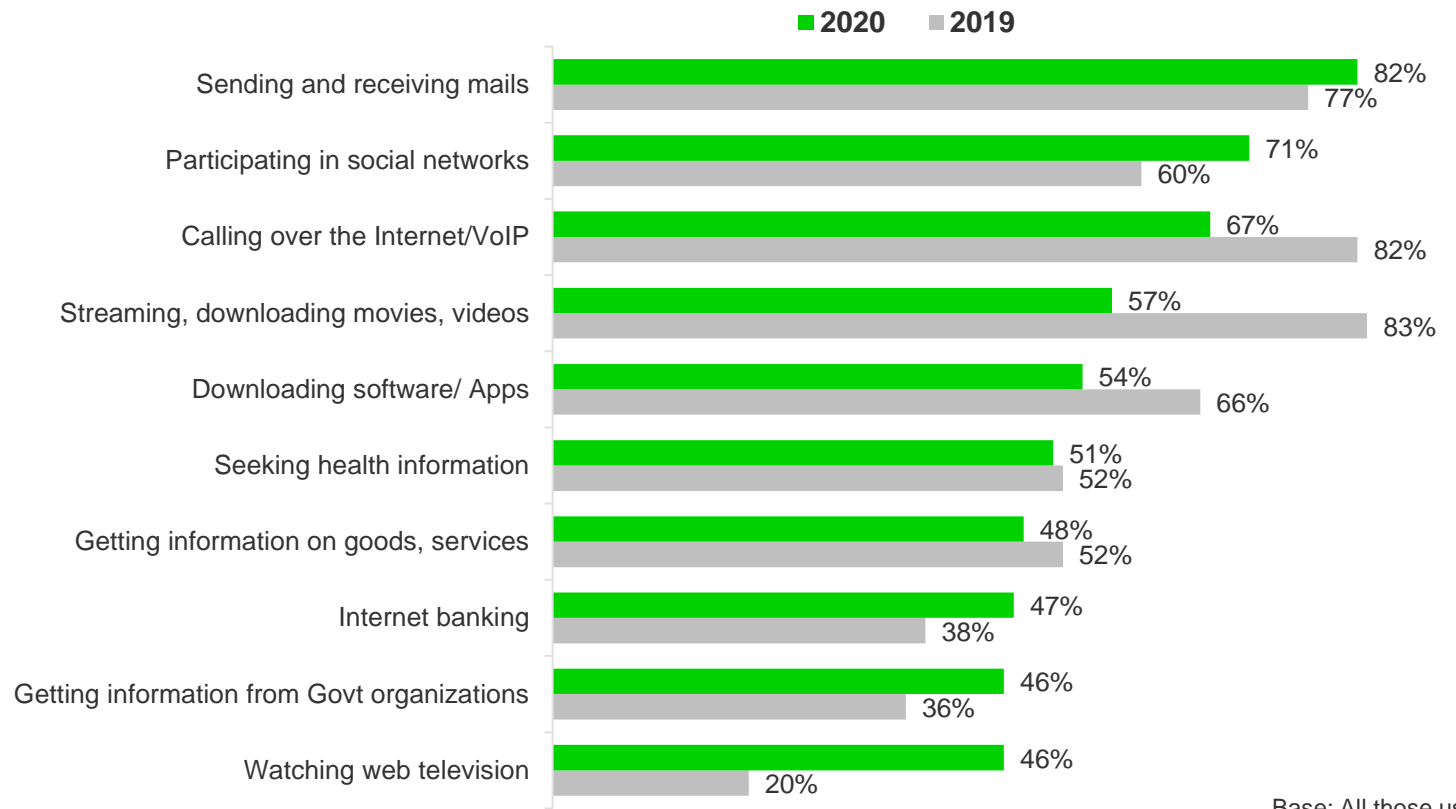
Figures in %



Base: All those used internet

Internet activities increased in current year, higher incidence of Sending/ receiving emails, Higher social network access etc.

TOP 10 INTERNET ACTIVITIES IN 2020



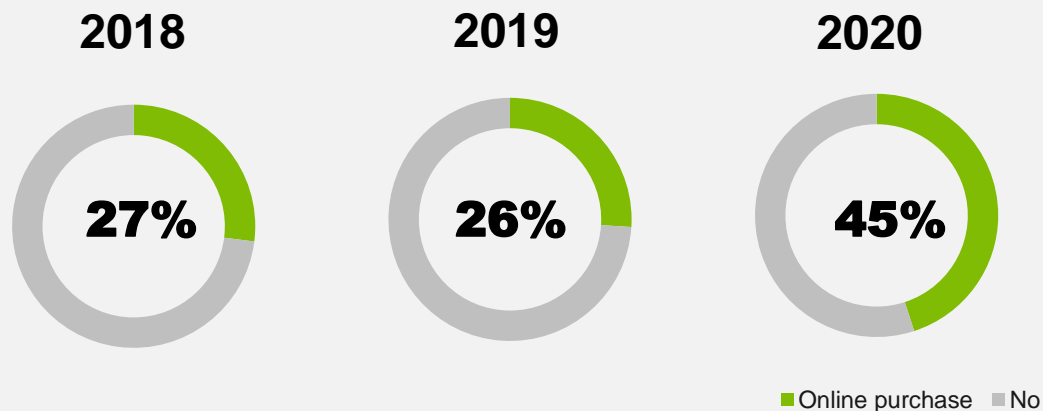
Base: All those used internet

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

E-commerce has expedited its footprint with online purchase and frequency significantly increased

ONLINE PURCHASE : INCIDENCE

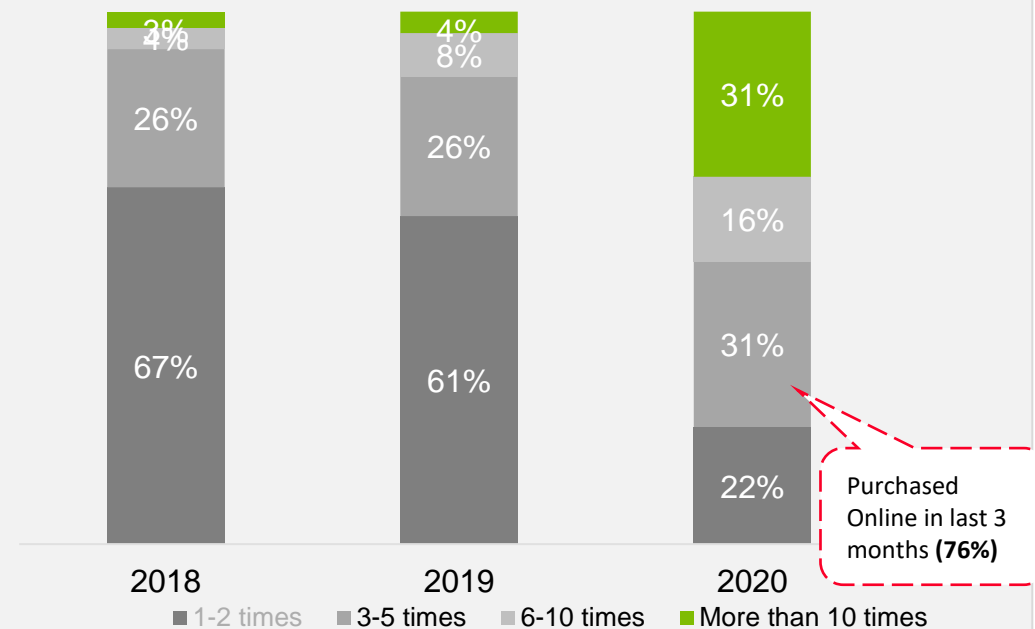
Figures in %



Base: All who used Internet

FREQUENCY OF ONLINE PURCHASE : LAST 12 MONTHS

Figures in %

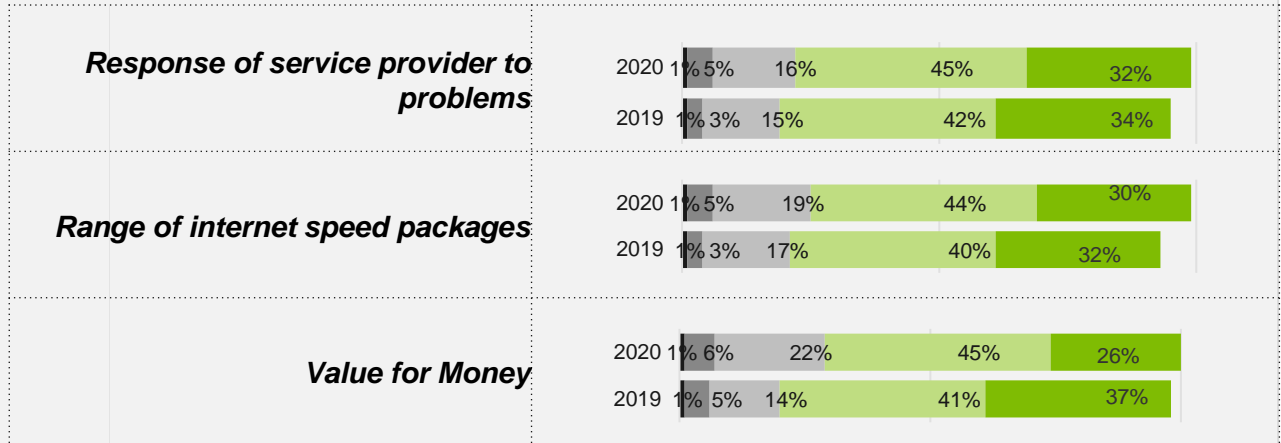
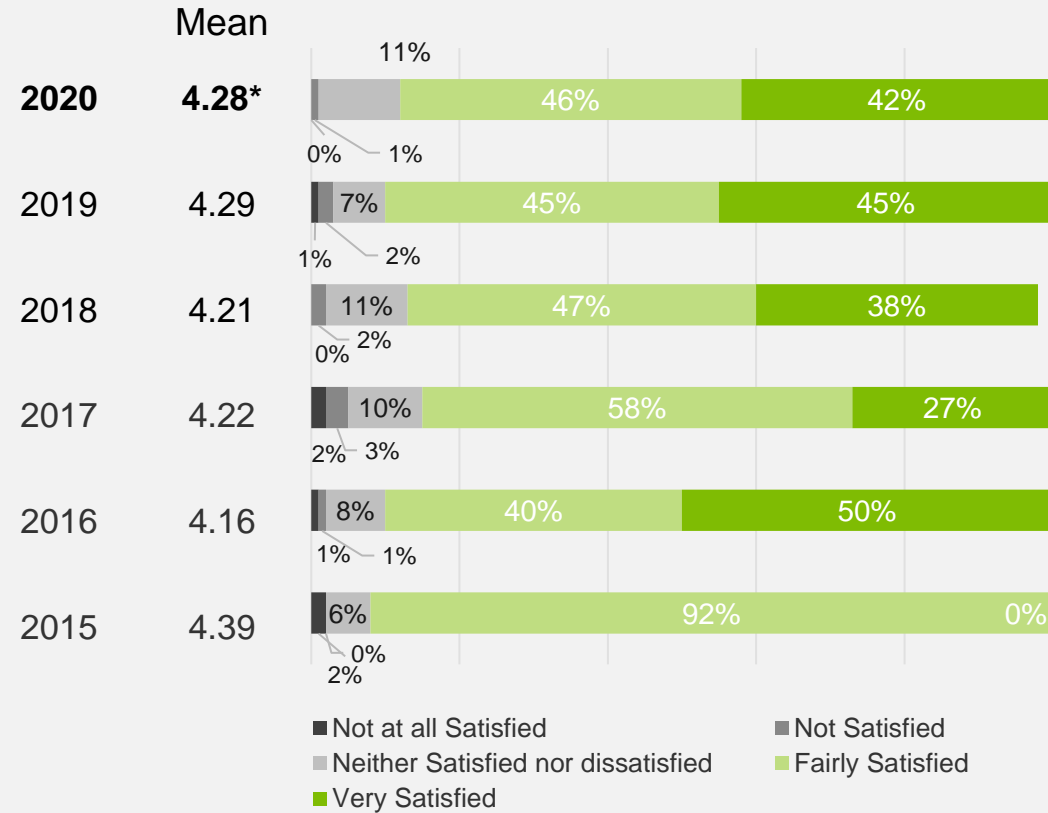


Base: All who purchased online in last 3 months

Overall Internet satisfaction continues to be rated high. However, value for money rated lower in comparison to previous year

SATISFACTION WITH INTERNET SERVICES

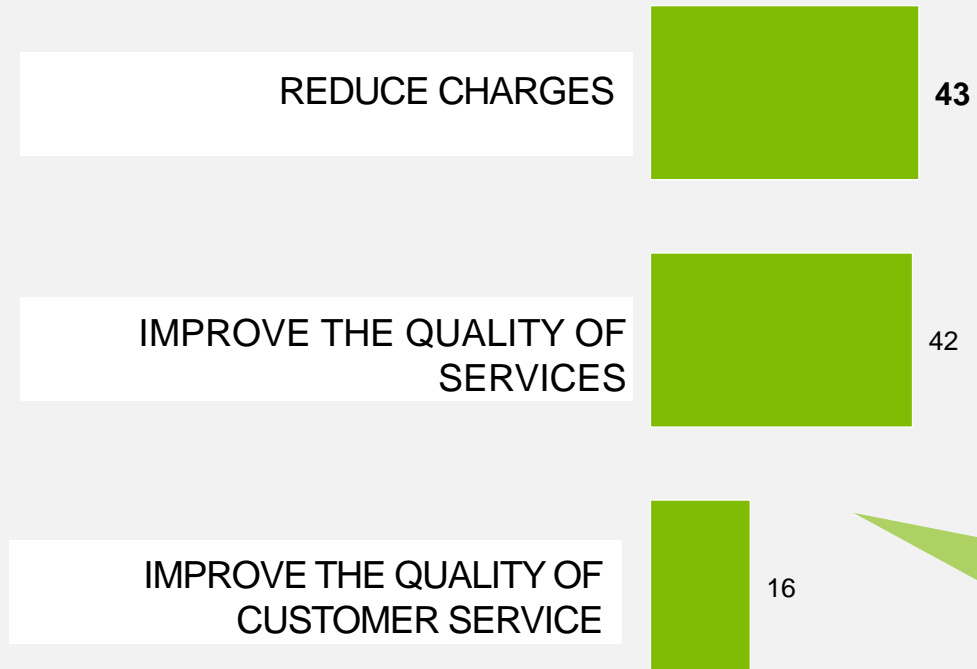
Figures in % (except mean)



Base: All those used internet

Reduced charges and better quality of service are seen as improvement areas

SUGGESTIONS TO IMPROVE INTERNET SERVICES



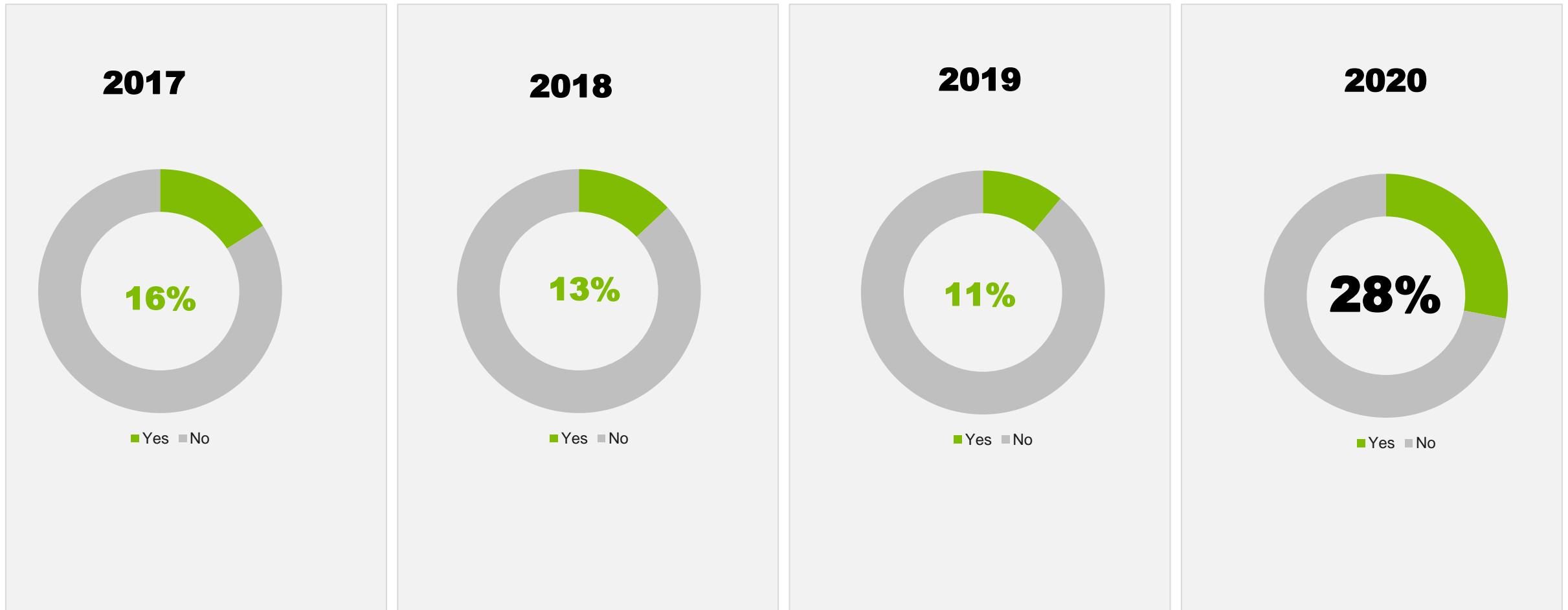
Residents Suggested:

- Improve Internet packages
- Stable, better connectivity in all areas
- Long term contract should not be there
- More offers/ promotions

Base: All those used internet

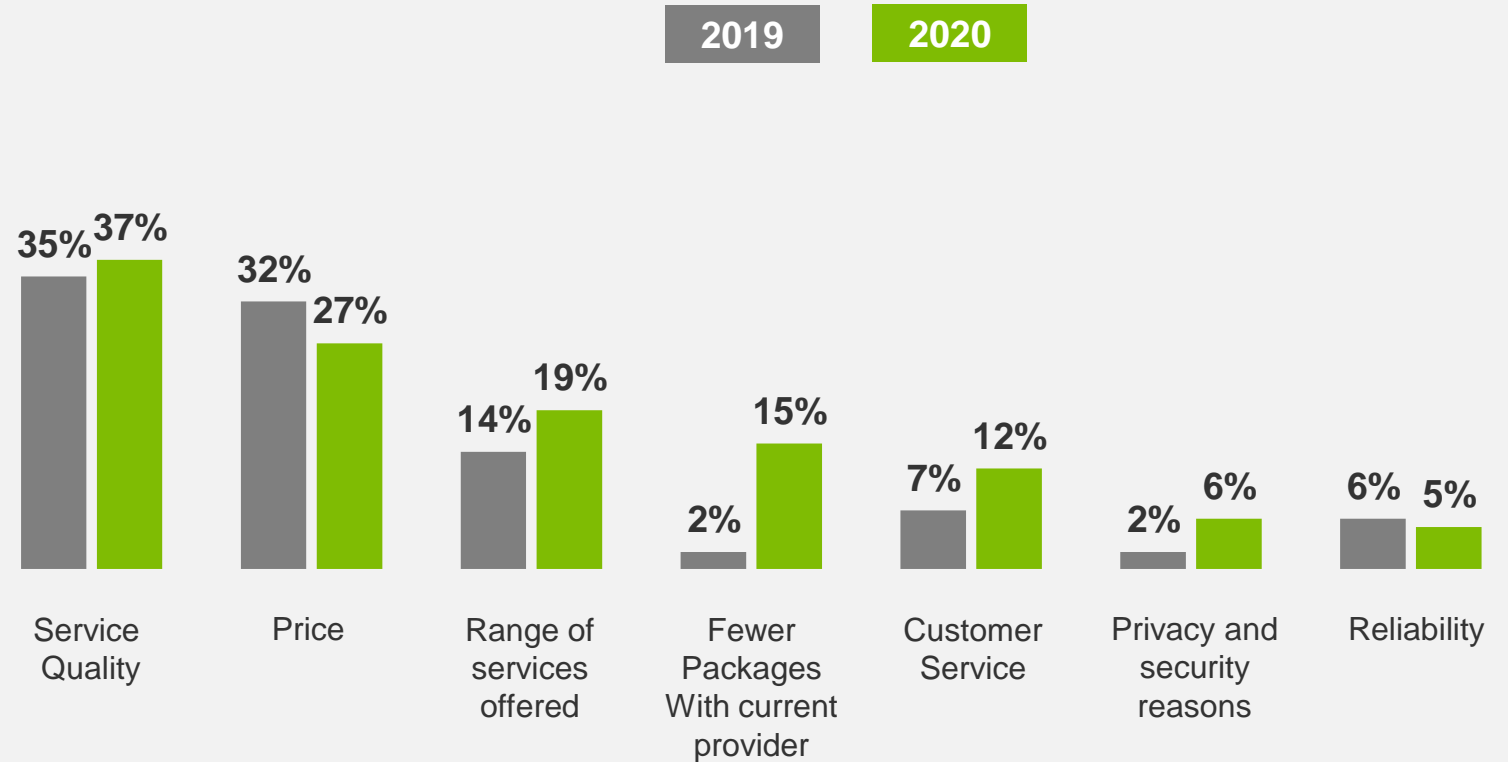
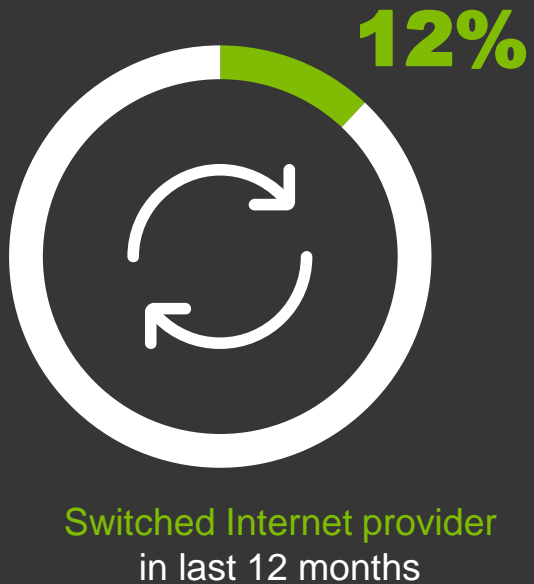
28% of the respondents are willing to pay BD 5 extra for high-speed internet - high in comparison to the last 3 years

Willingness to pay BD 5 for high speed internet



REASONS for switching internet provider are largely Quality related

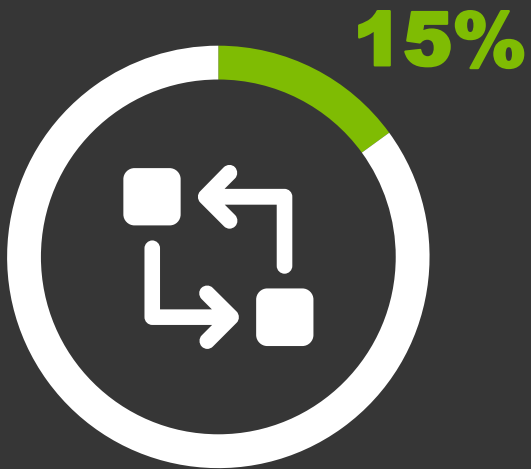
Figures in %



Base: Those who switched Internet service providers

REASONS for replacing fixed internet with mobile is mainly Speed than Price

Figures in %



Replaced Fixed Internet with Mobile Internet

2019 2020

63%

51%

More Speed



61%

41%

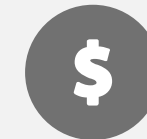
Can be used anywhere



41%

21%

Cheaper



Base: Those replaced fixed internet with mobile

06

OTT Applications

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OTT USAGE

USAGE



97%

WhatsApp remains most used OTT

SCOPE



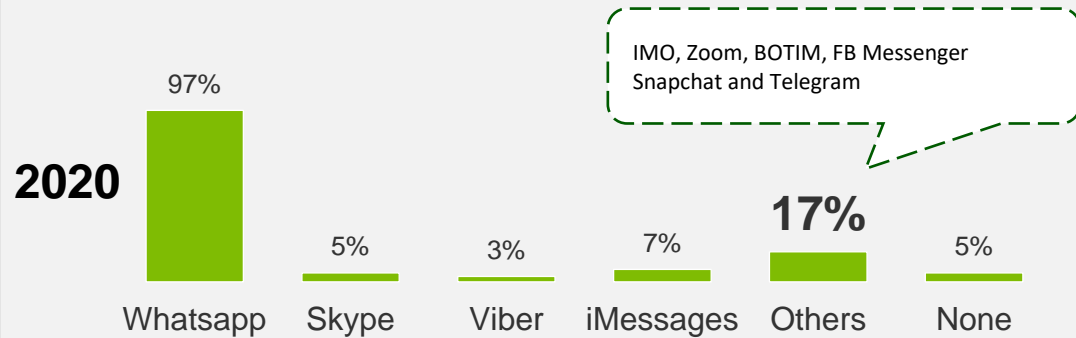
88%

Majority of respondents use OTT application to communicate



Multiple OTT App fighting for screen time along with WhatsApp. SMS usage too seeing a rebound given certain services are being offered through it

OTT APPS USED

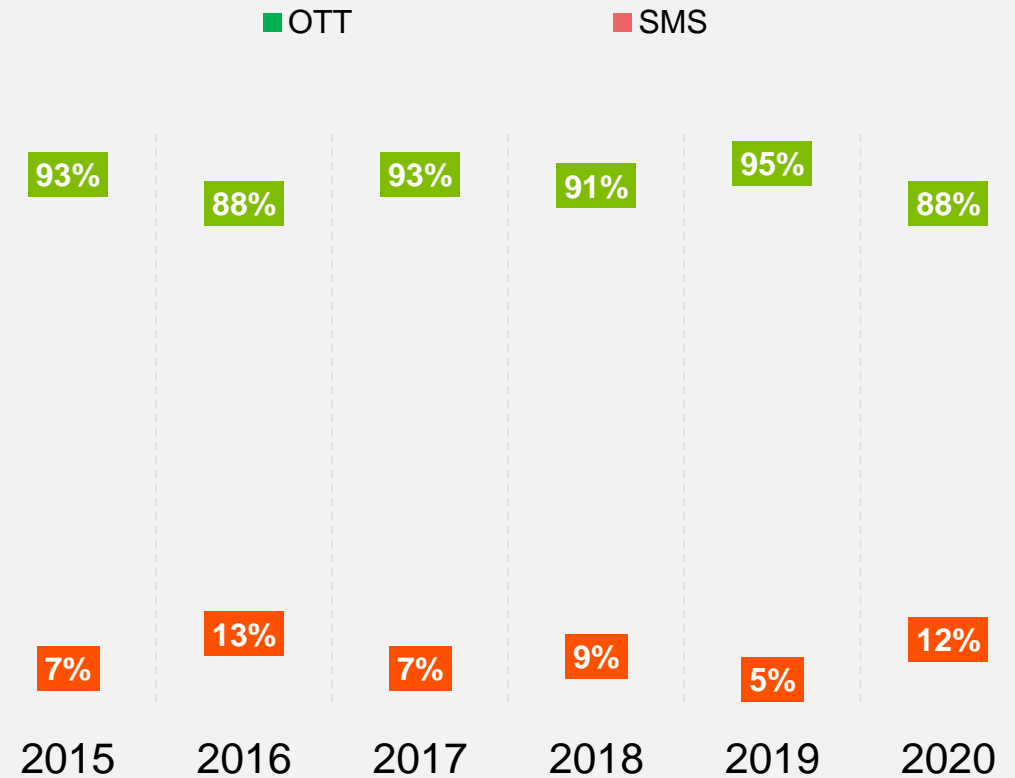


OTT APPS USED - TREND

Base: All respondents

	WhatsApp	Skype	Viber	iMessages	Others	None
2020	97%	5%	3%	7%	17%	5%
2019	100%	18%	15%	6%		1%
2018	96%	34%	29%	22%		1%
2017	99%	42%	39%	16%		
2016	98%	43%	34%	28%		N/A
2015	95%	26%	39%	13%		

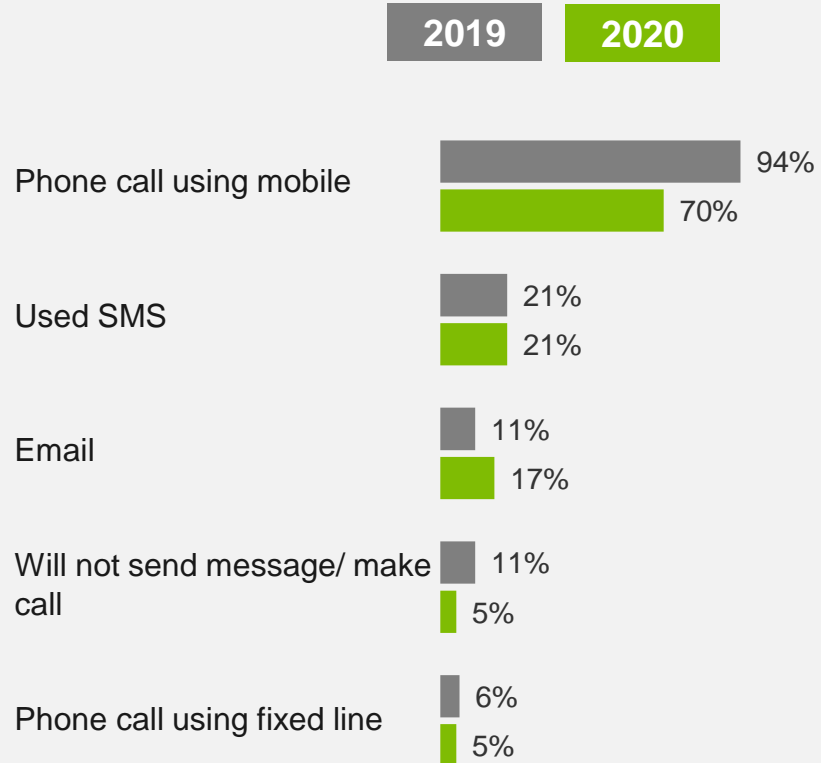
PROPORTION OF MESSAGING – OTT VS SMS



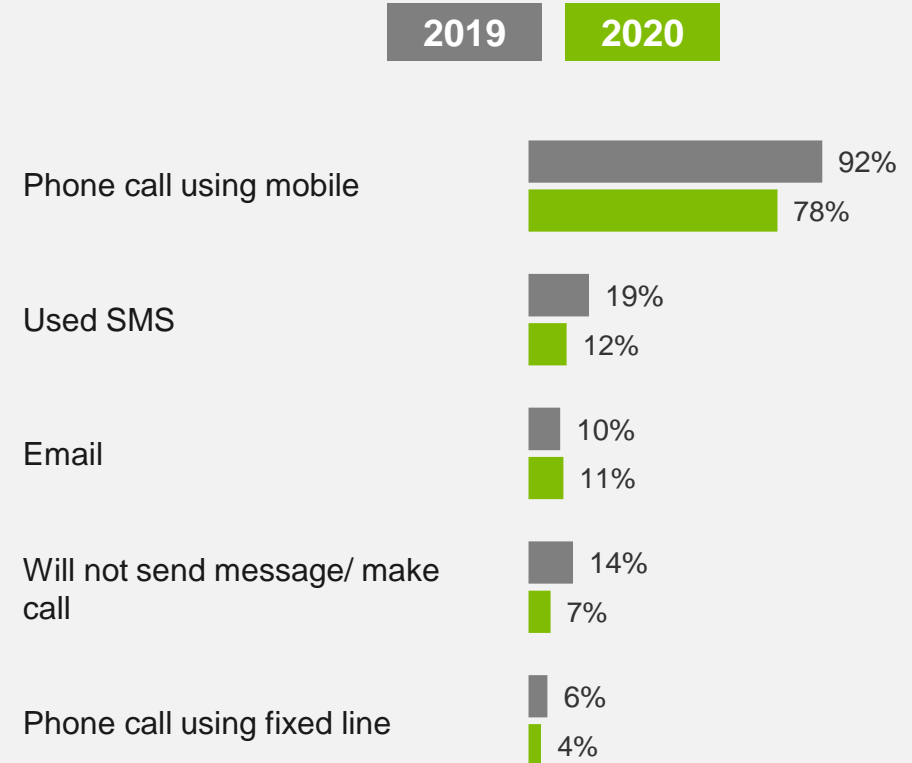
Base: those who use OTT

Calls using mobile continues to be the preferred alternative in case of unavailability of OTT services

WHAT IF INSTANT MESSAGING APPS ARE NOT AVAILABLE



WHAT IF OTT CALLING IS NOT AVAILABLE



Base: those who use OTT

07

International Calling

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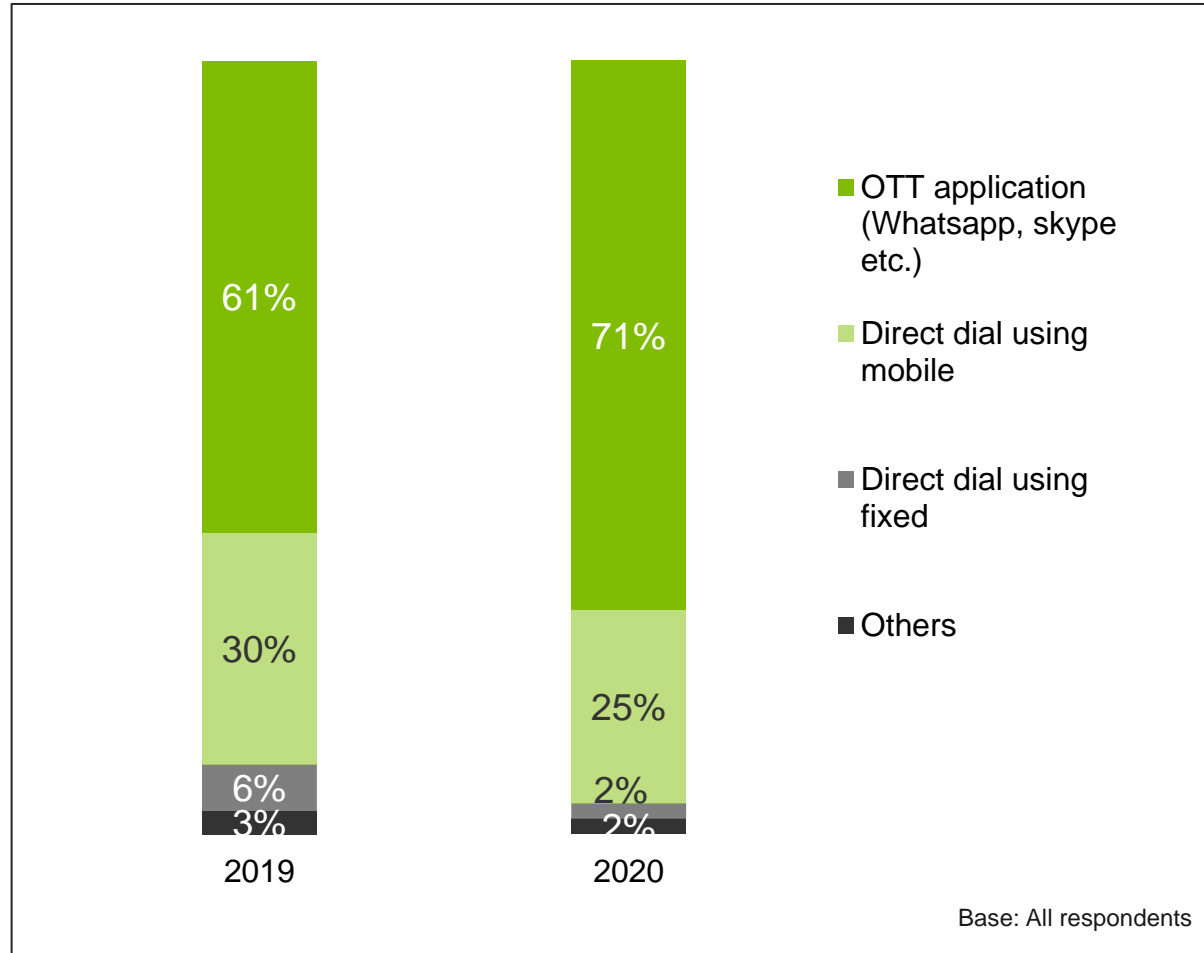
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OTT application (WhatsApp, Skype etc.) is most preferred way to make international calls.

Methods used to make international calls most often



08

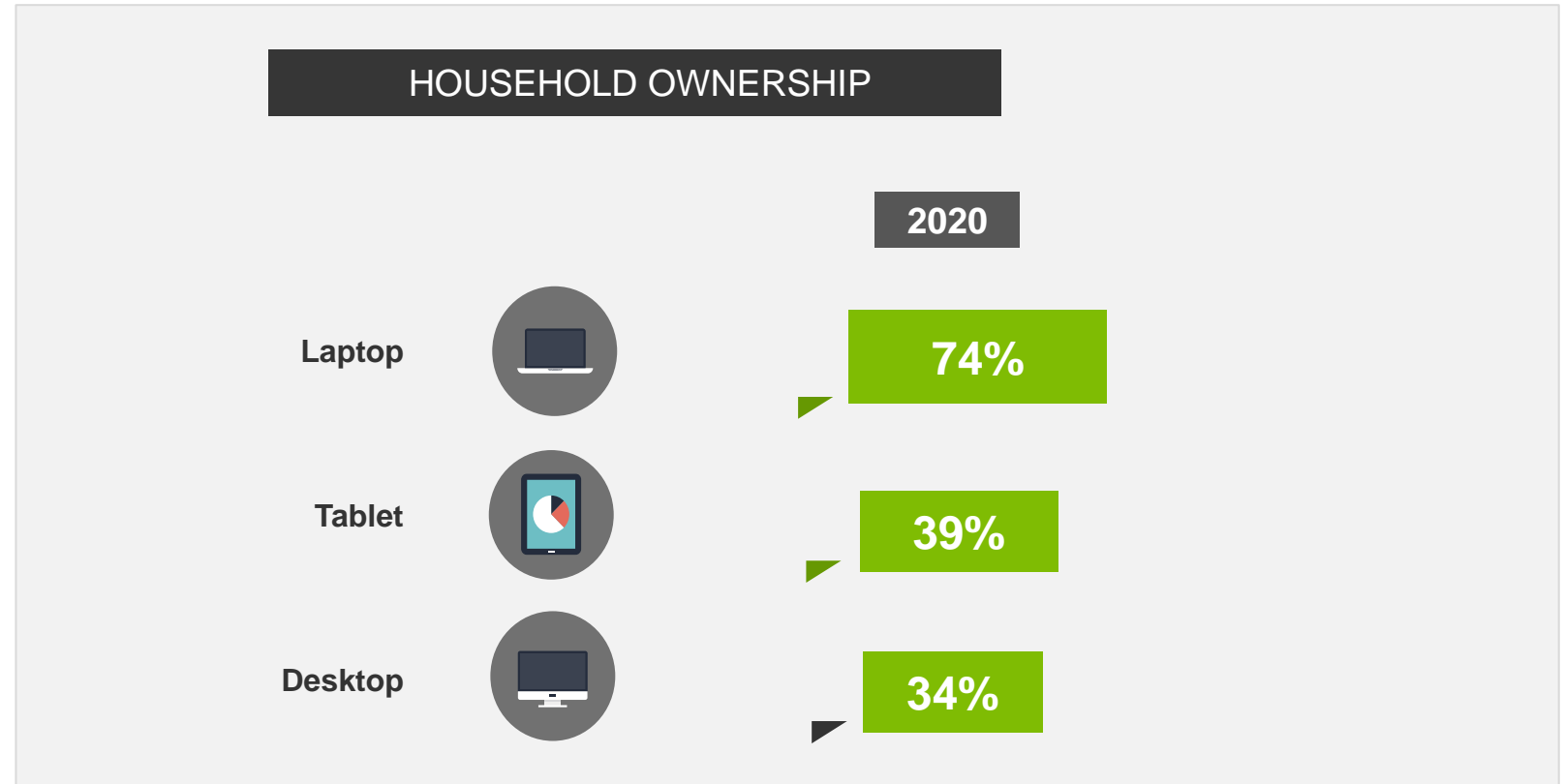
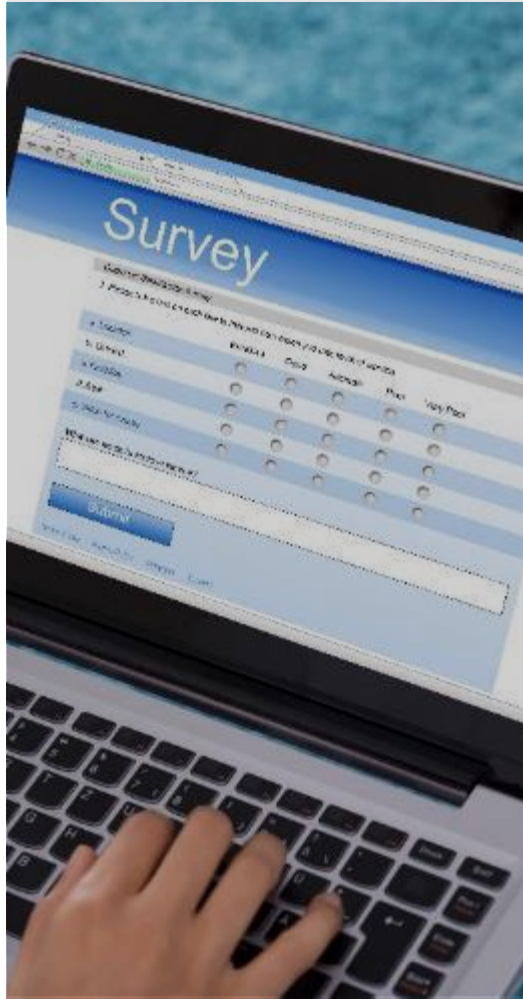
Impact of Covid On Device Ownership & Usage Behavior

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COVID resulting in ownership of Laptop, Tablets and Desktop increasing across households



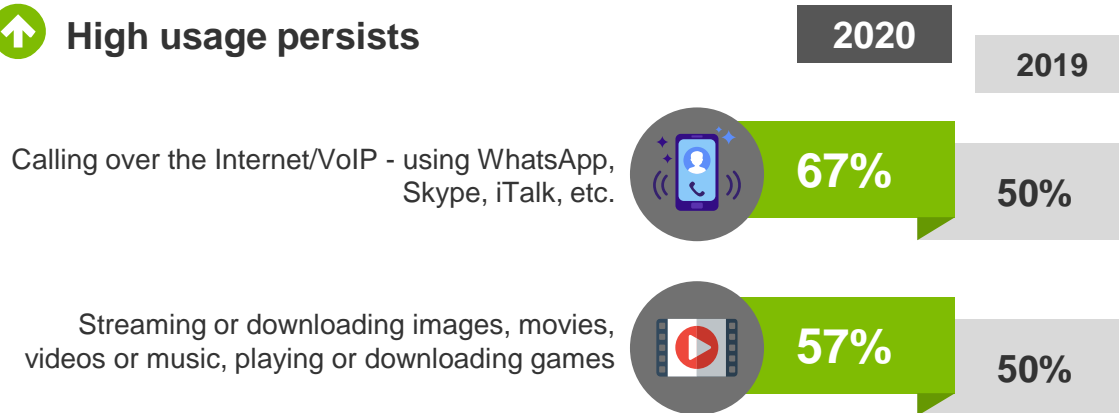
Base: All Respondents

We no longer “go online” | We “live online”

Digital Adoption is leading to industry barriers collapsing & customers adopting new behaviours

COMPUTER USAGE : That continue to be high

↑ High usage persists



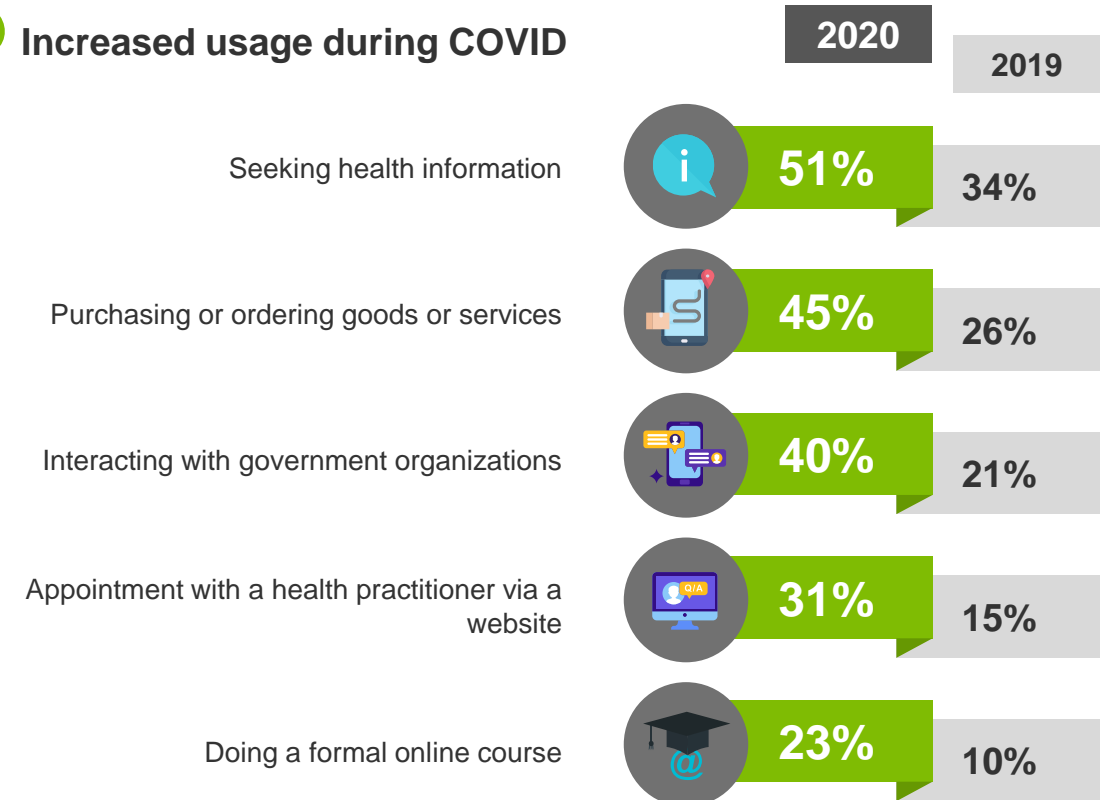
INTERNET USAGE AND ACTIVITIES : That continue to be low

Low usage persists



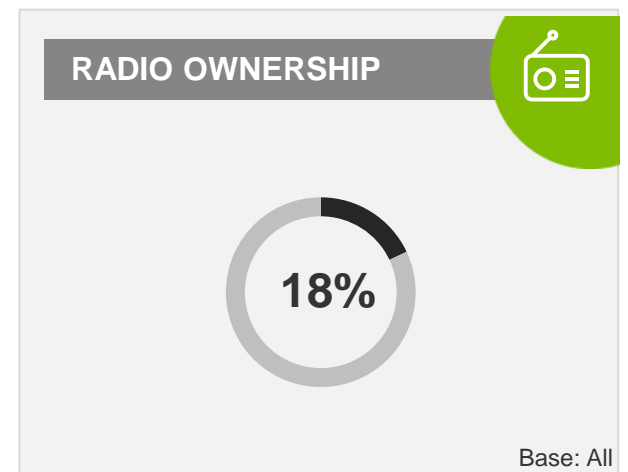
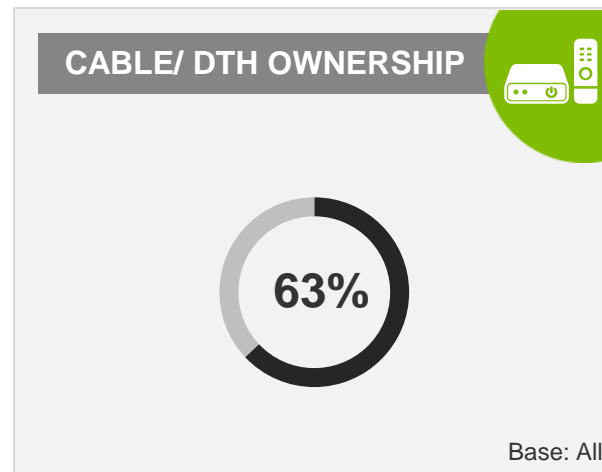
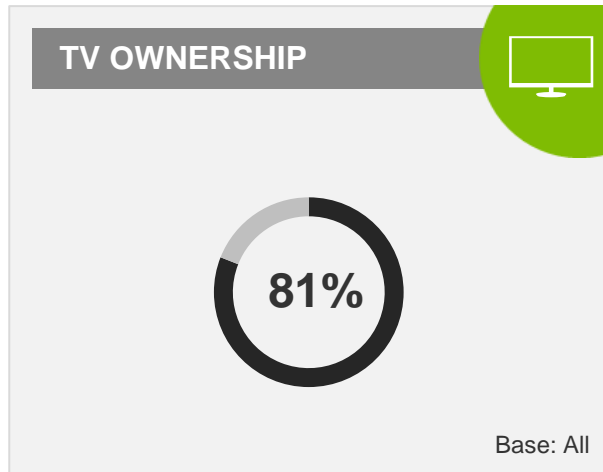
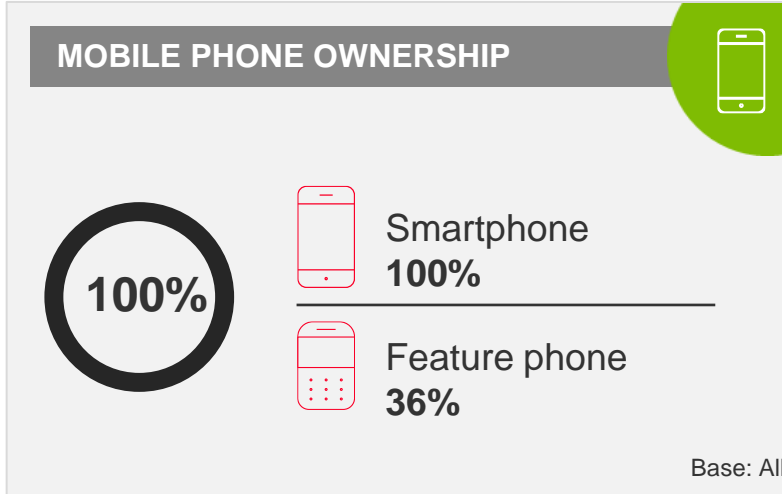
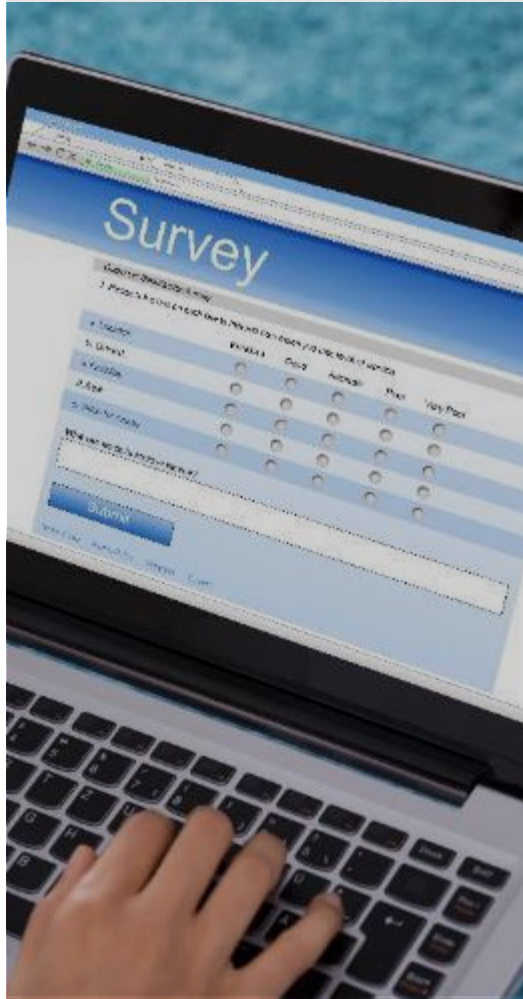
INTERNET USAGE AND ACTIVITIES: Increased during COVID

↑ Increased usage during COVID



Base: All

Other Device Ownership: Everybody in Bahrain has access to Smartphone



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