



# TELECOMMUNICATIONS

## SERVICE MARKET SURVEY

2021

Residential Study

July 2022

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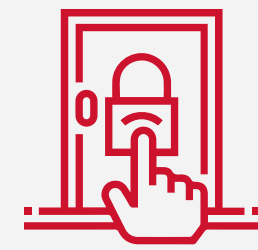
# 01

## Objective & Sample Distribution

Bahrain Telecommunications Survey  
2021 (Residential)

# The key objectives of the telecommunications Services Market Survey are:

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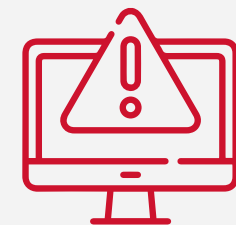
Understand the **access** and **usage** levels for telecommunications services in Bahrain

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

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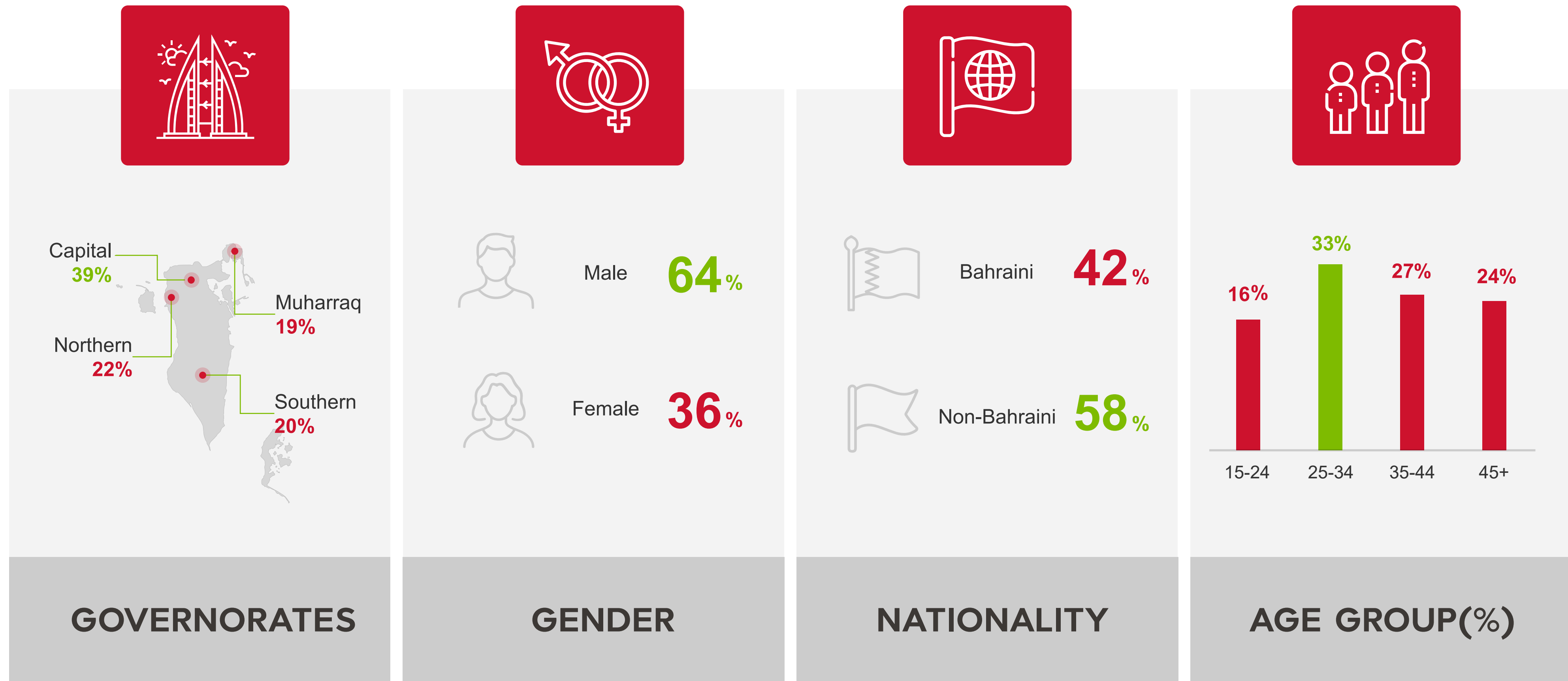
Identify any **market failures** and assist in its decisions to take appropriate regulatory action.



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

# Survey Sample

1531 Face to Face interviews\* has been conducted among residents of Bahrain in 2021



# 02

## Summary of Findings Bahrain

Bahrain Telecommunications Survey  
2021 (Residential)

# Key findings of 2021 residential survey



**99%** of respondents use Mobile data

**73%** of respondents are satisfied with Mobile Services

**MOBILE SERVICES**



**25%**

of respondents purchased goods & services online with purchase frequency at highest level

**INTERNET USAGE**



**80%**

of respondents prefer OTT App to make international calls

**INTERNATIONAL CALLING**



**100%** of respondents used internet in last 3 months

**95%** of respondents using internet daily

**72%** of respondents are satisfied with Internet services

**INTERNET**

03

# Mobile Services

Bahrain Telecommunications Survey  
2021 (Residential)

# Mobile service

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**100%**

## ACCESS

All respondents use Mobile services and all own smart phone



**51%**

## INTERNATIONAL CALLS

Of mobile phone users make International calls using their mobile phone service



**99%**

## MOBILE DATA

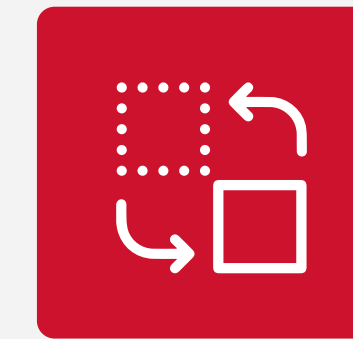
Of respondents use mobile data to access internet



**7%**

## SIM CARD

Of respondents use more than 1 SIM card, primarily to keep separate numbers for business and personal use



**2%**

## SWITCHING PROVIDERS

Of respondents switched their mobile phone provider in last 12 months with the main reason being to get good (Discounts and Promotions)



**73%**


## SATISFACTION

Of respondents are Satisfied with Mobile services. Improved International voice call quality and overall connectivity

# All respondents have access to a mobile phone and mainly use it to make calls to other mobile phones

## Access to a Mobile phone



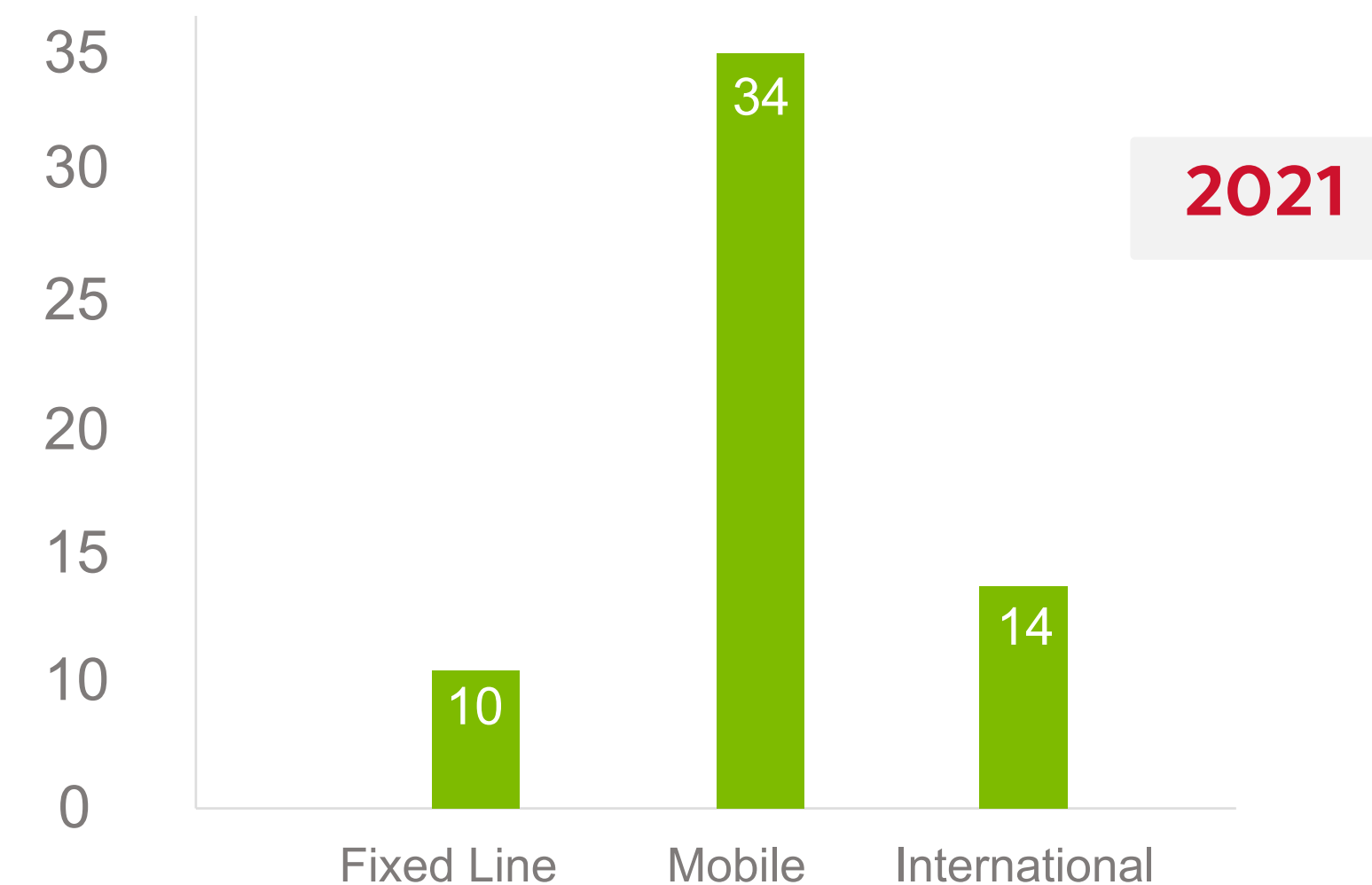
 Of respondents use mobile phones

## Average number of calls per week made from Mobile phones

2019	6	43	6
2018	6	25	6
2017	9	60	8
2016	9	26	11

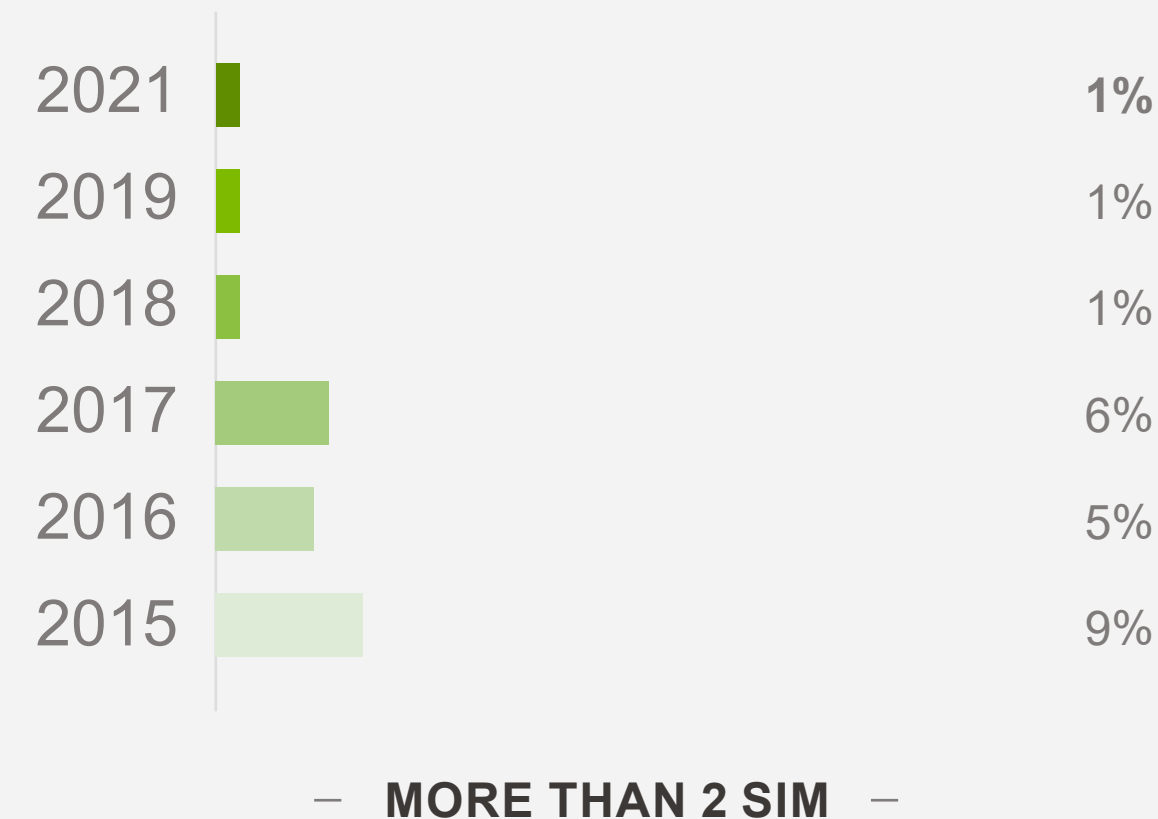
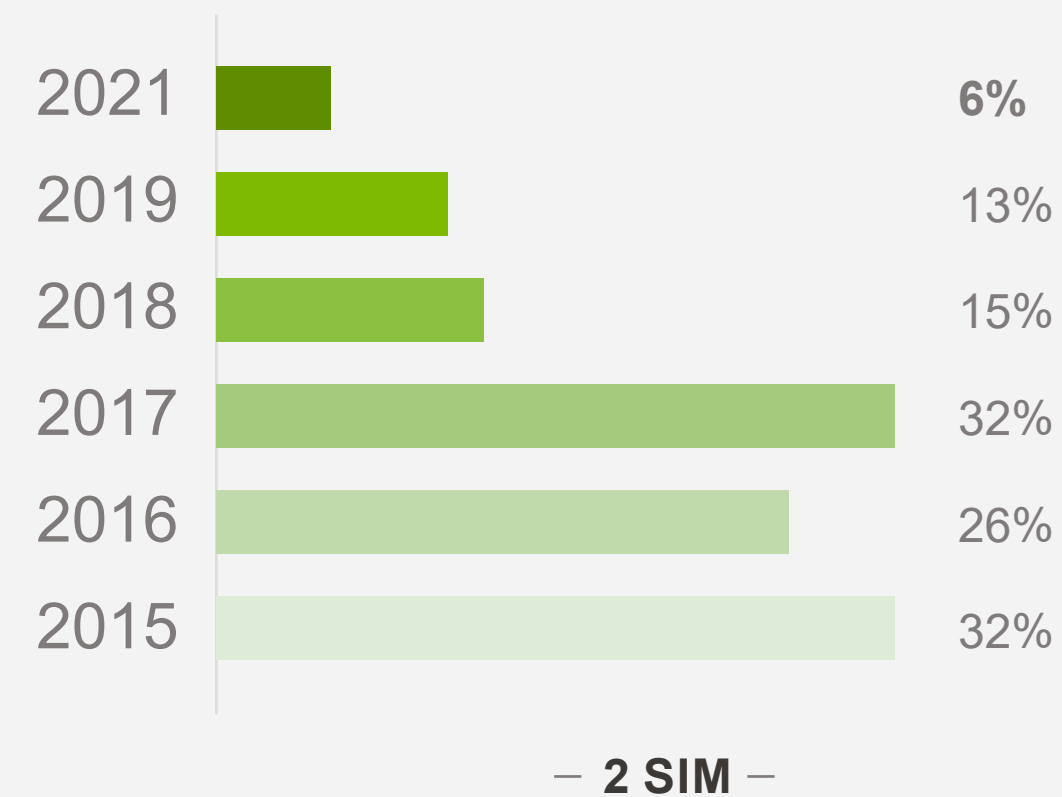
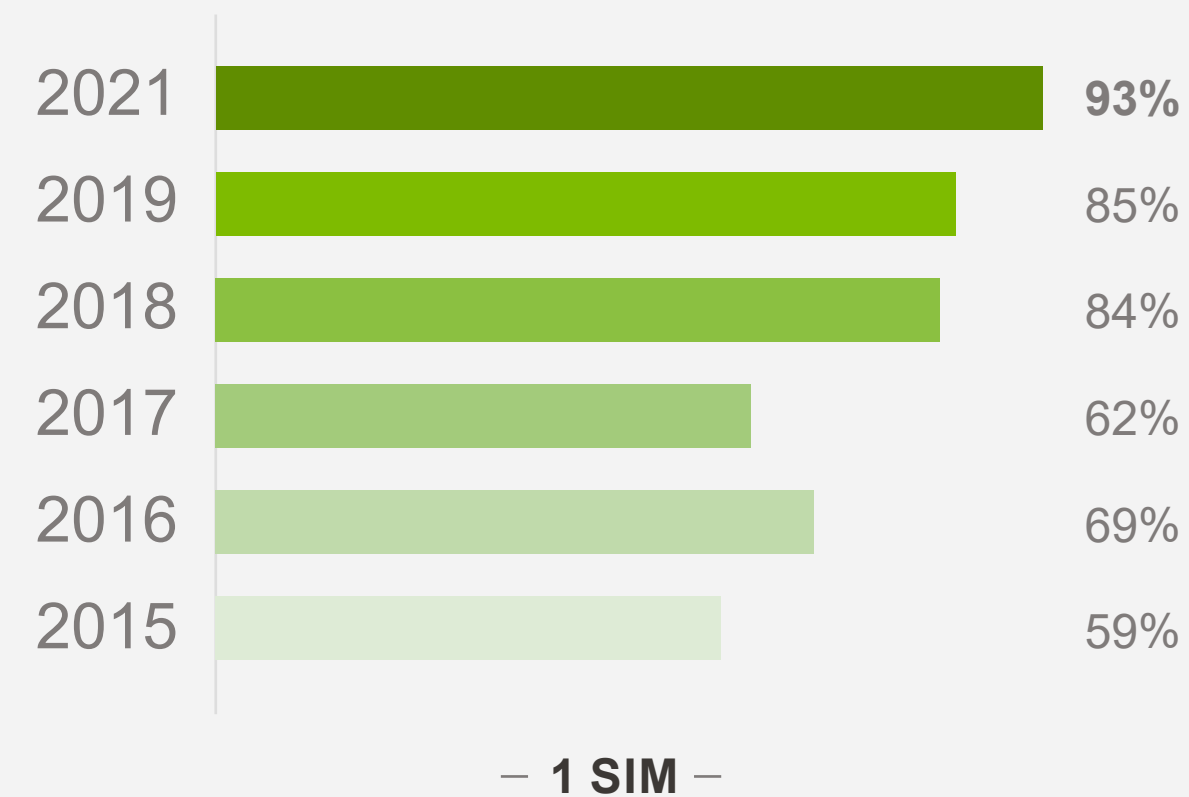
Q. Do you own and use a mobile phone?

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



# Most respondents use a single SIM card Others use multiple cards mainly to separate business and personal numbers

## Number of SIM cards



Q. How many Active SIM cards did you use in the last three months for your own needs ?

Base: All Respondents

## Reasons for using Multi SIM

**76%**

To have separate SIMs for business, office or personal use

**23%**

To take advantage of different promotions offered by different operators

**22%**

To use separate SIMs for voice and mobile data (i.e. internet)

**10%**

To get better connectivity with other regions of the country

**9%**

To use when traveling abroad

**4%**

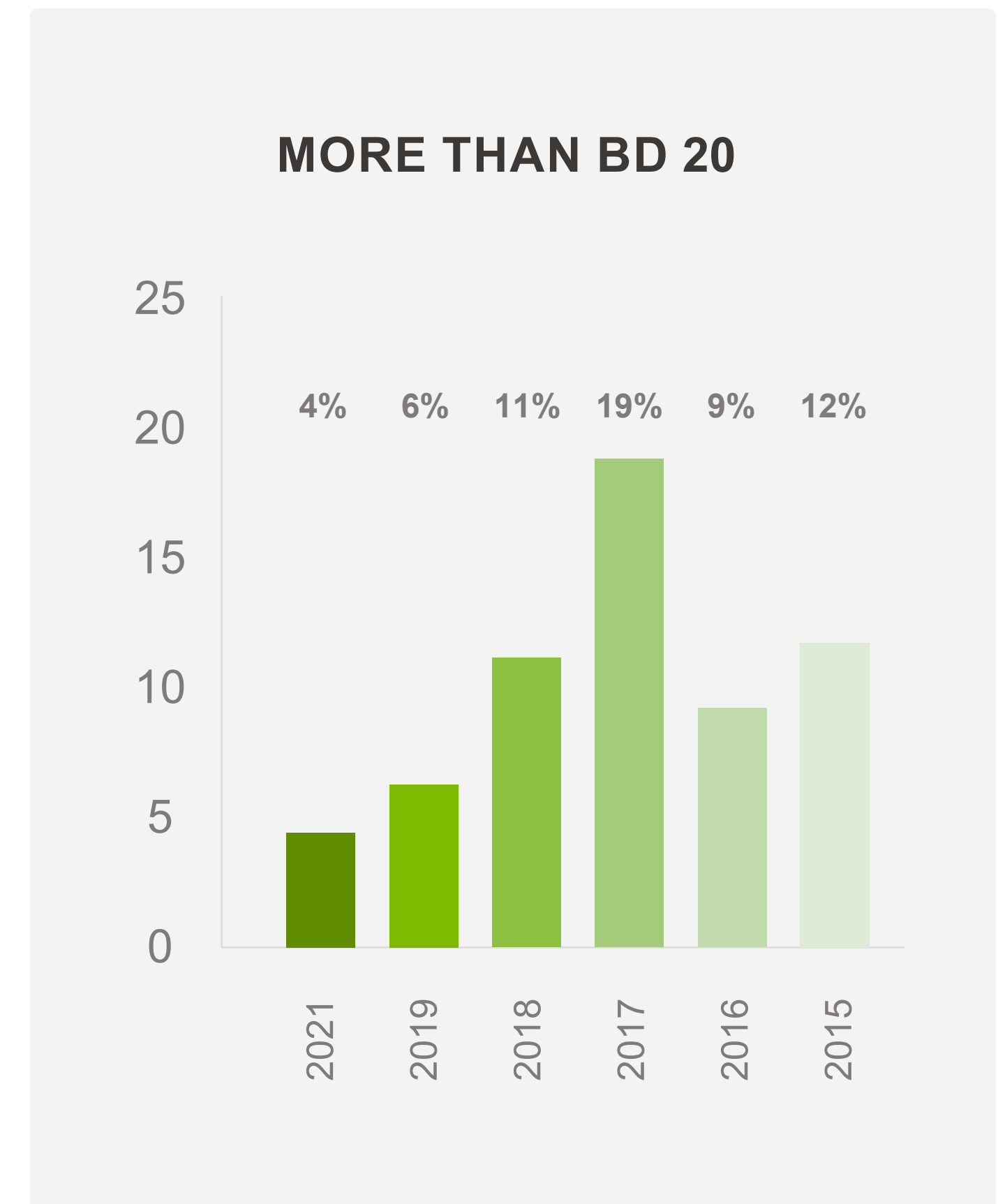
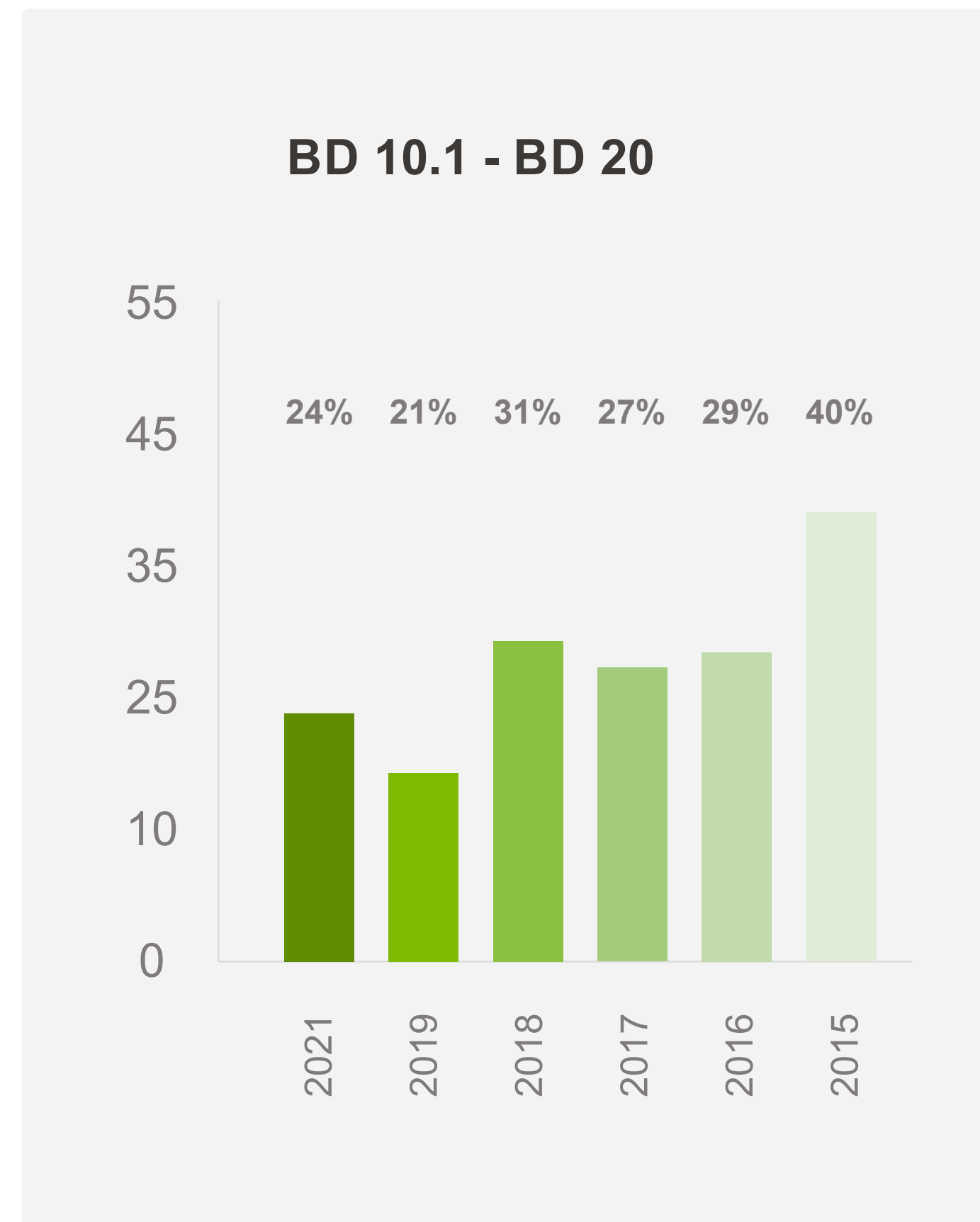
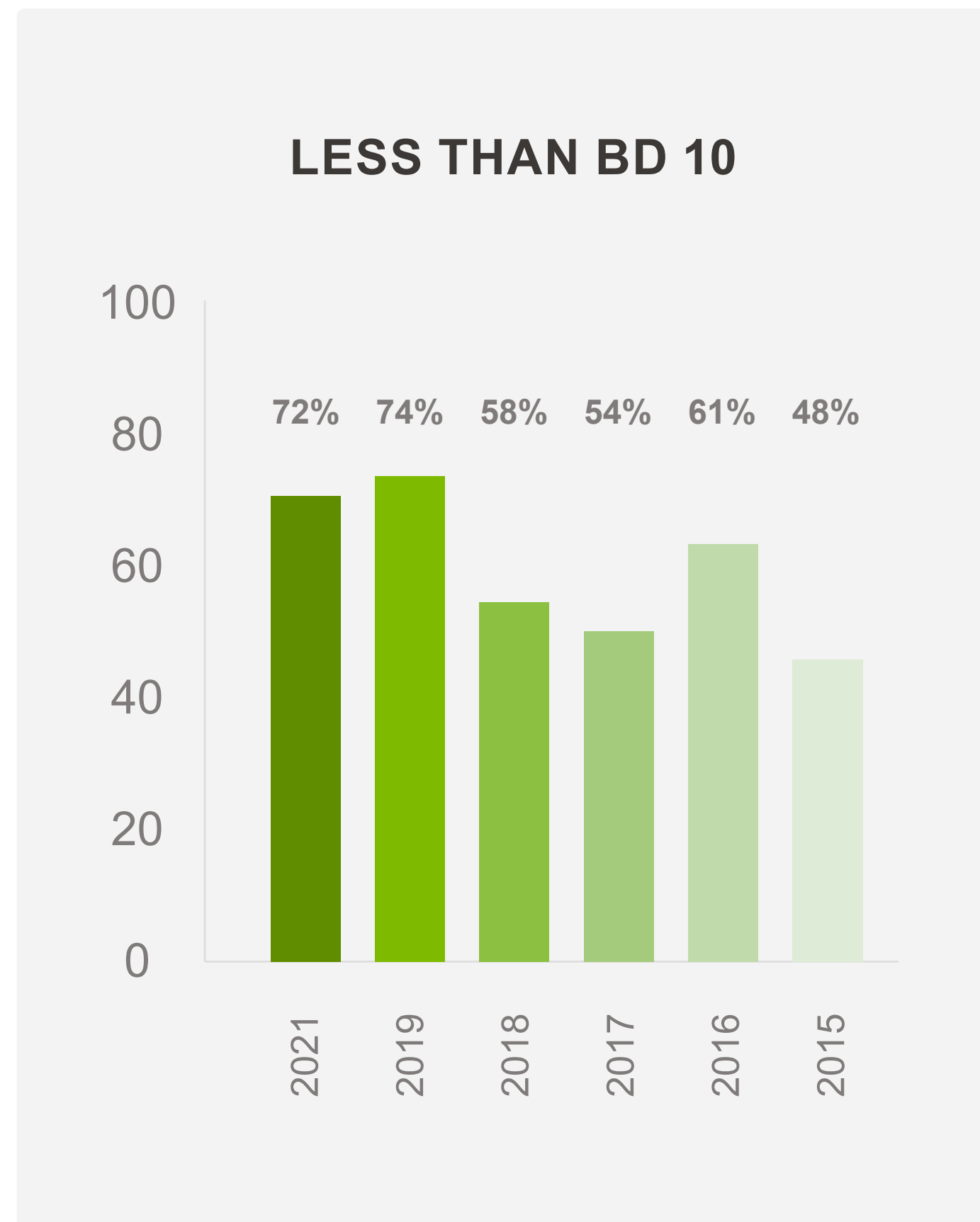
Separate SIM for Postpaid and Prepaid

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

Base: All Multi SIM Users

# Average monthly spend on mobile has declined during 2021

## Average monthly spend on mobile

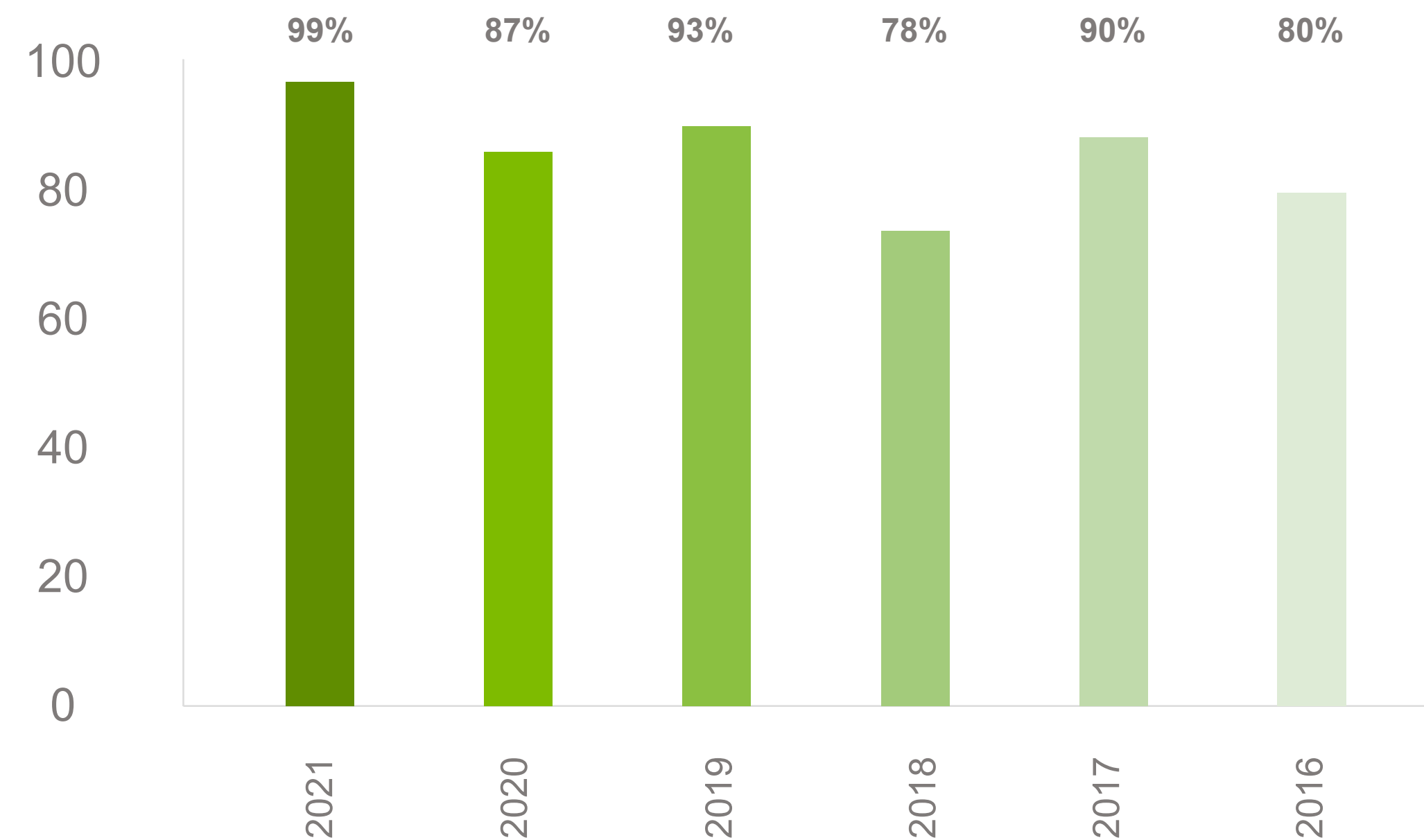


Q. What is your household's average monthly bill on mobile services?

Base : All

# Usage of Mobile Data to access internet increased in 2021

## Mobile data to access internet



Q. Do you use mobile data to access the internet?

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

\*Calibrated mean scores

Base : All

## Satisfaction with mobile data connectivity



Satisfaction with Connectivity, pricing, Quality of customer service and variety of mobile products have declined in 2021, It's seen across Bahrainis and Expat Arabs.

Top Box: Very satisfied %	Mobile data connectivity	Price of mobile data	Variety of mobile voice and data products	Quality of customer service
<b>2021*</b>	30%	24%	30%	27%
<b>2020*</b>	51%	26%	44%	36%
<b>2019</b>	38%	28%	28%	35%

# Overall, 73% of respondents are satisfied with mobile services

## Satisfaction with Mobile services

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

*\*Some attributes are not put in 2020 because of change in methodology*

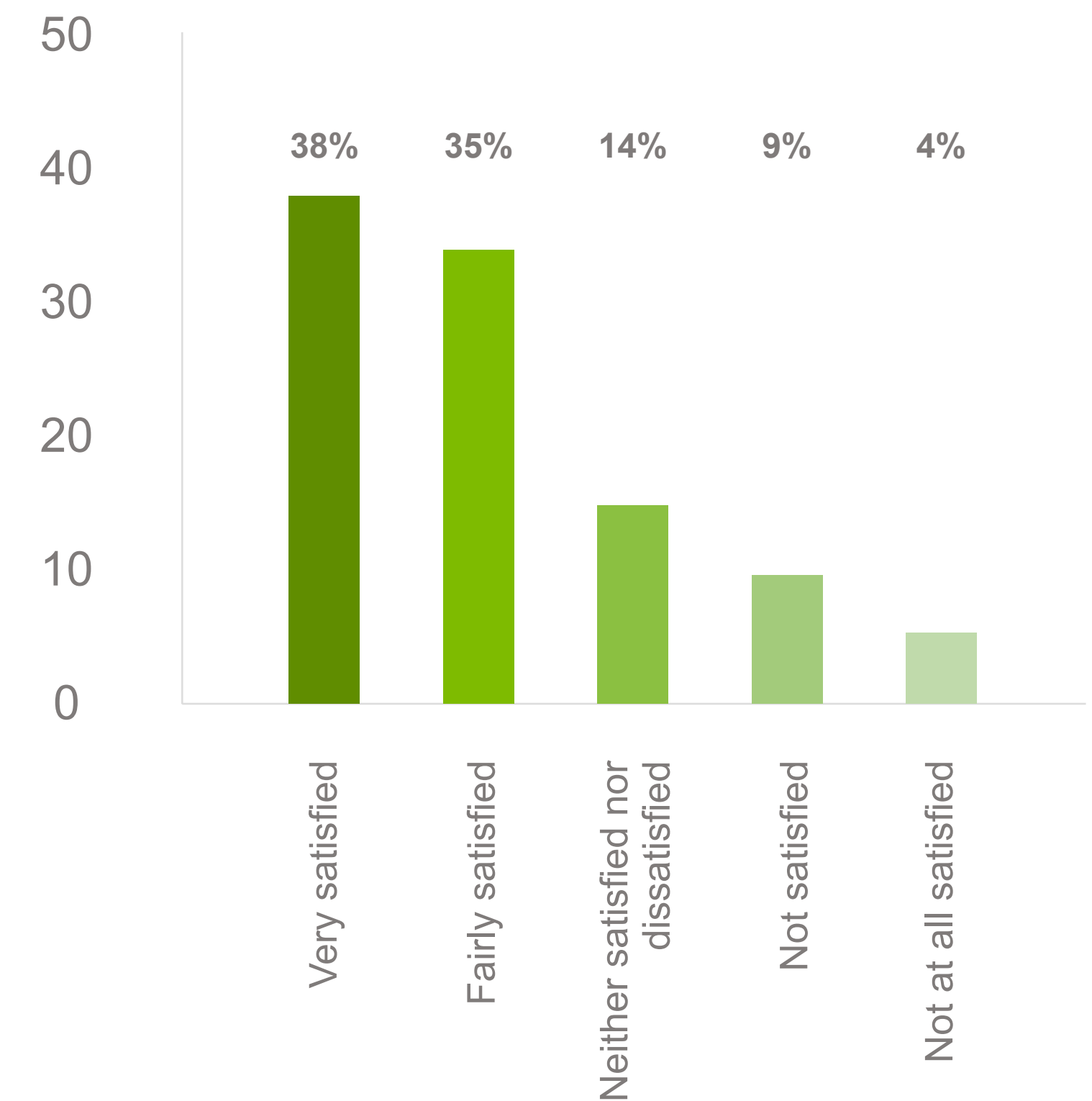
*\*\*Don't Know Mentions Not Shown. Will not add to 100% before 2021*

Base : All

**MEAN 3.92**



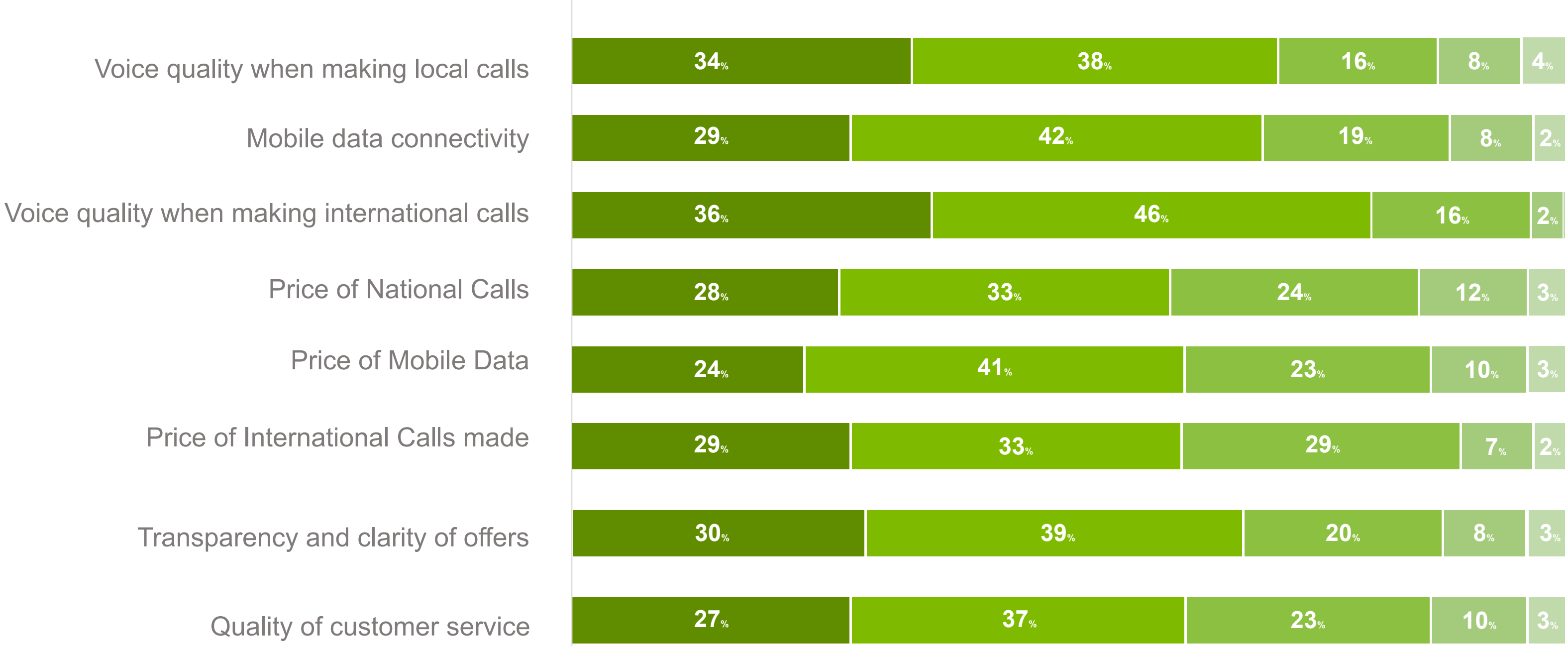
**2021**



# Satisfaction with mobile services is driven by data connectivity and call quality.

## Satisfaction with Mobile services

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Not satisfied
- Not at all satisfied



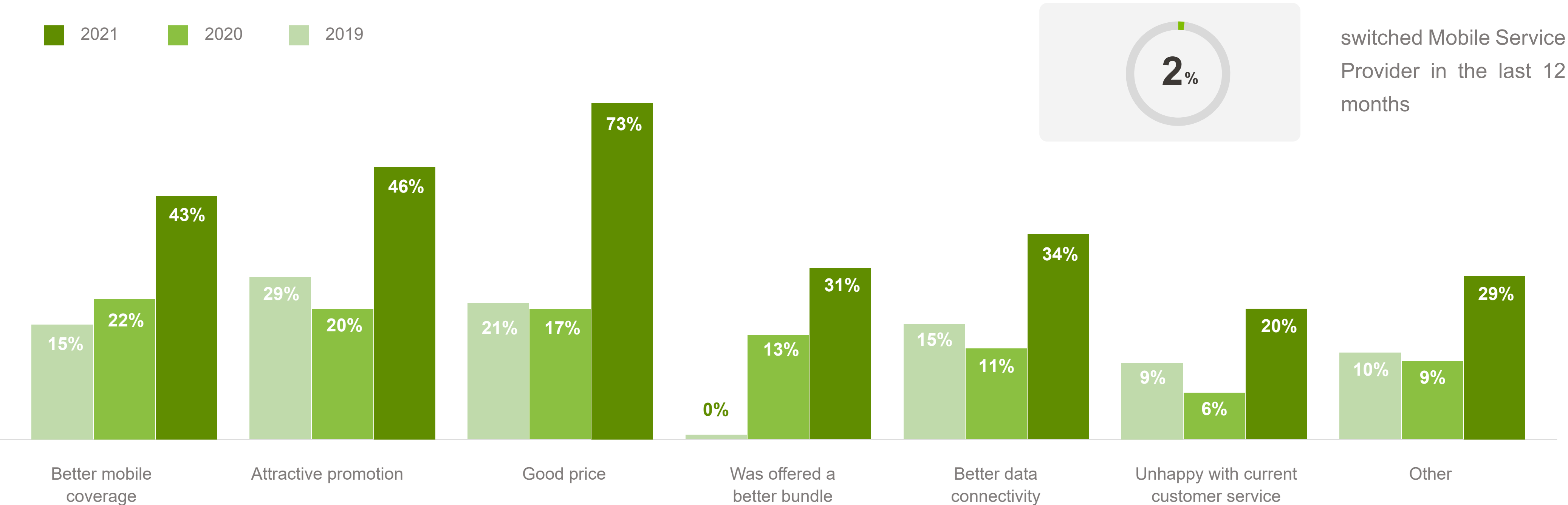
Q. How satisfied are you with the following elements of your Mobile services?

*\*\*Don't Know Mentions Not Shown. Will not add to 100% before 2021*

Base : All

# Better pricing and promotion is the key reason for switching between mobile service providers

## Most important reason for switching mobile service provider

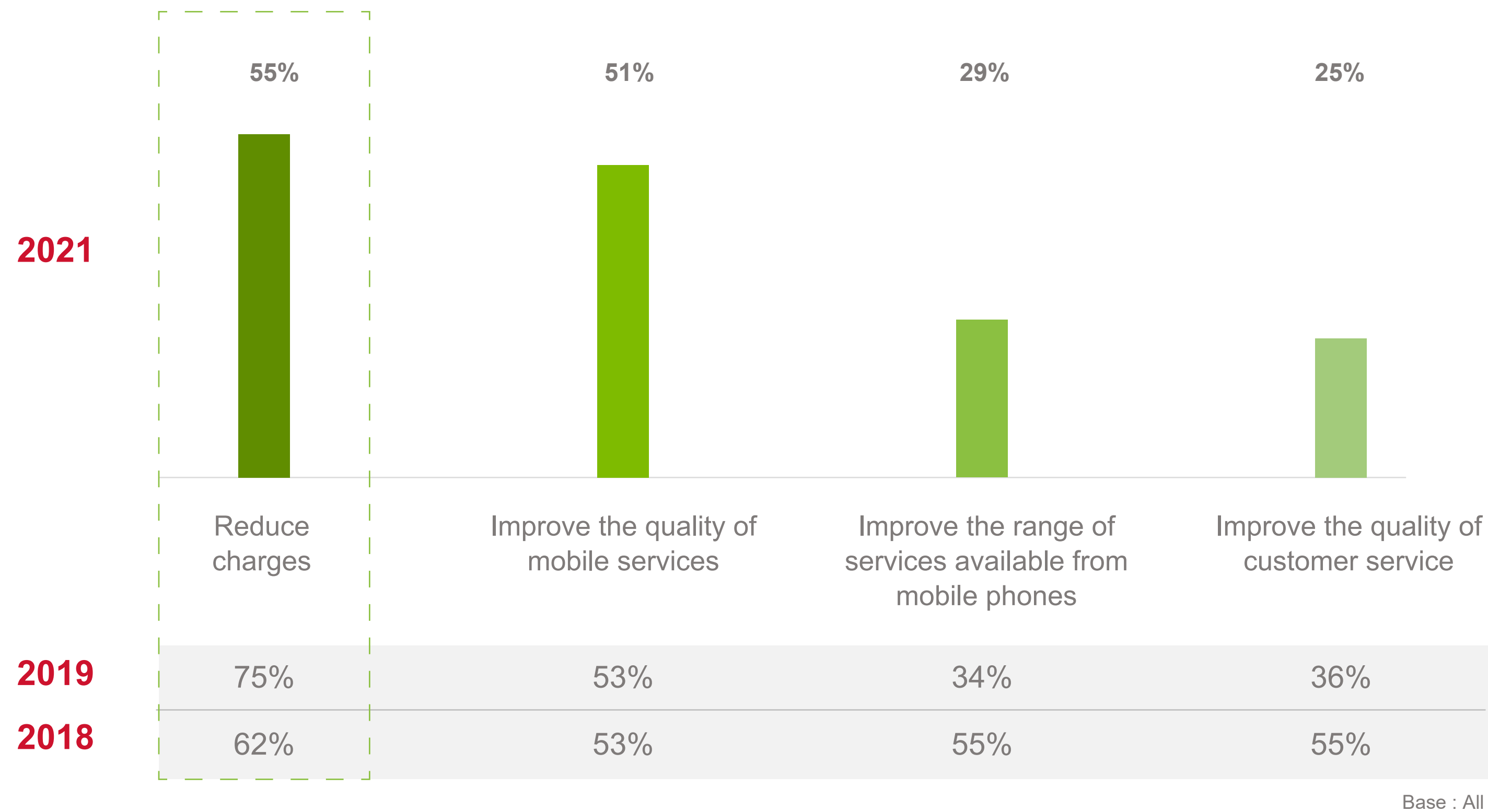


Q. Have you switched between mobile providers in the last 12 months where you do not use the previous provider anymore?  
 Q. Please tell me what was the most important reason for which you have switched your mobile service provider?

Base: All Who Switched Between Mobile Providers

# For mobile services, although pricing continues to be the key improvement area, it has improved vs previous years

## Suggestions to improve mobile services



Q. Could you please tell me if there are any suggestions you would like to make to help serve you better in the future for mobile phones?  
 \*attributes are not put in 2020 because of change in methodology



04

# Internet Services

Bahrain Telecommunications Survey  
2021 (Residential)

# Internet service

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**100%**

**ACCESS**

Of respondents have access to home internet



**100%**

**USAGE**

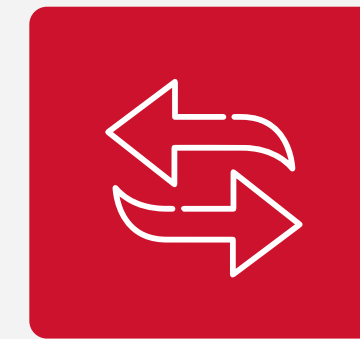
All respondents have used the internet daily in the last 3 months.



**25%**

**E-COMMERCE**

Of respondents purchase goods & services online with purchase frequency at highest level



**3%**

**SWITCHING PROVIDERS**

Of respondents have switched their internet service provider in the last 12 months mainly due to quality.



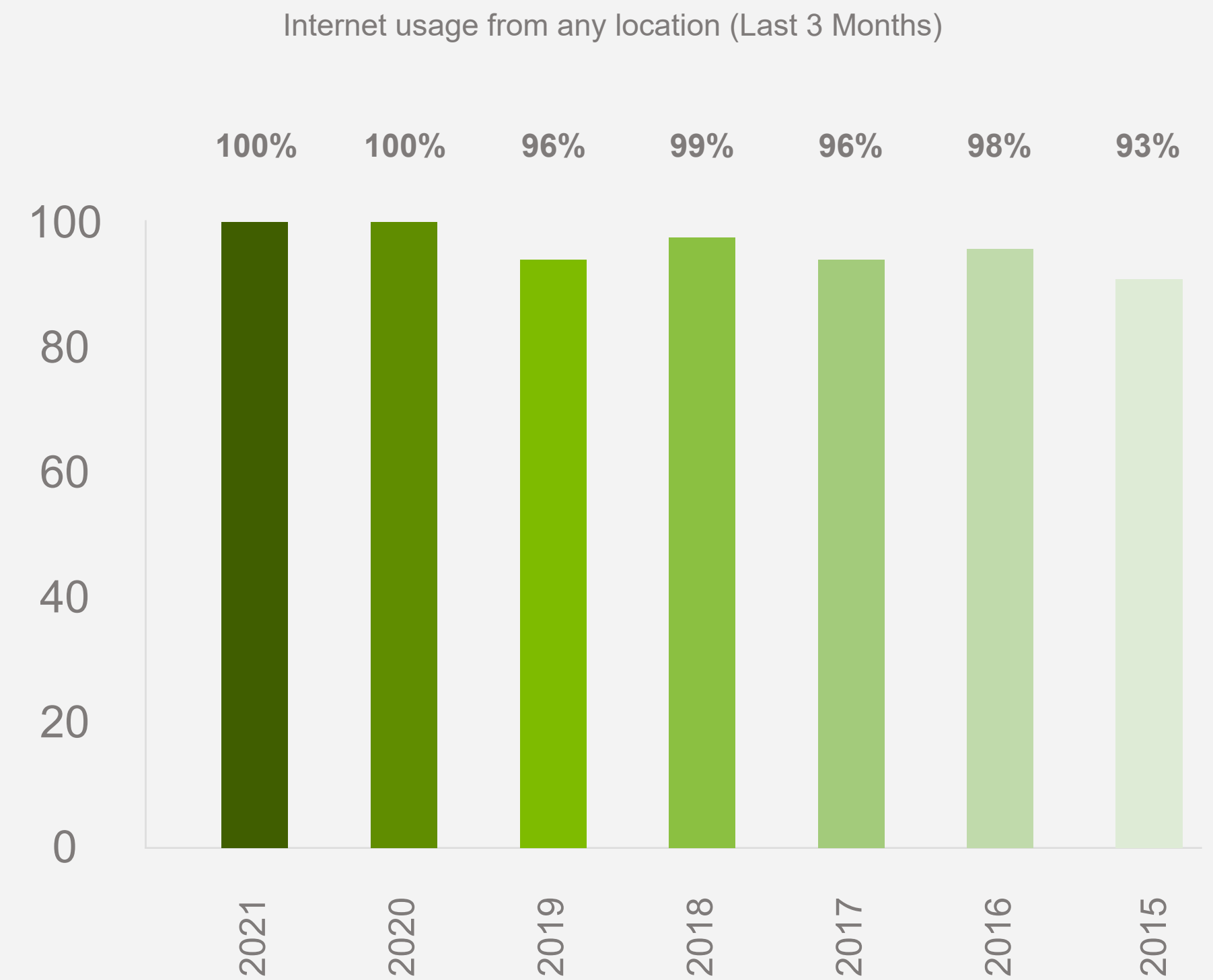
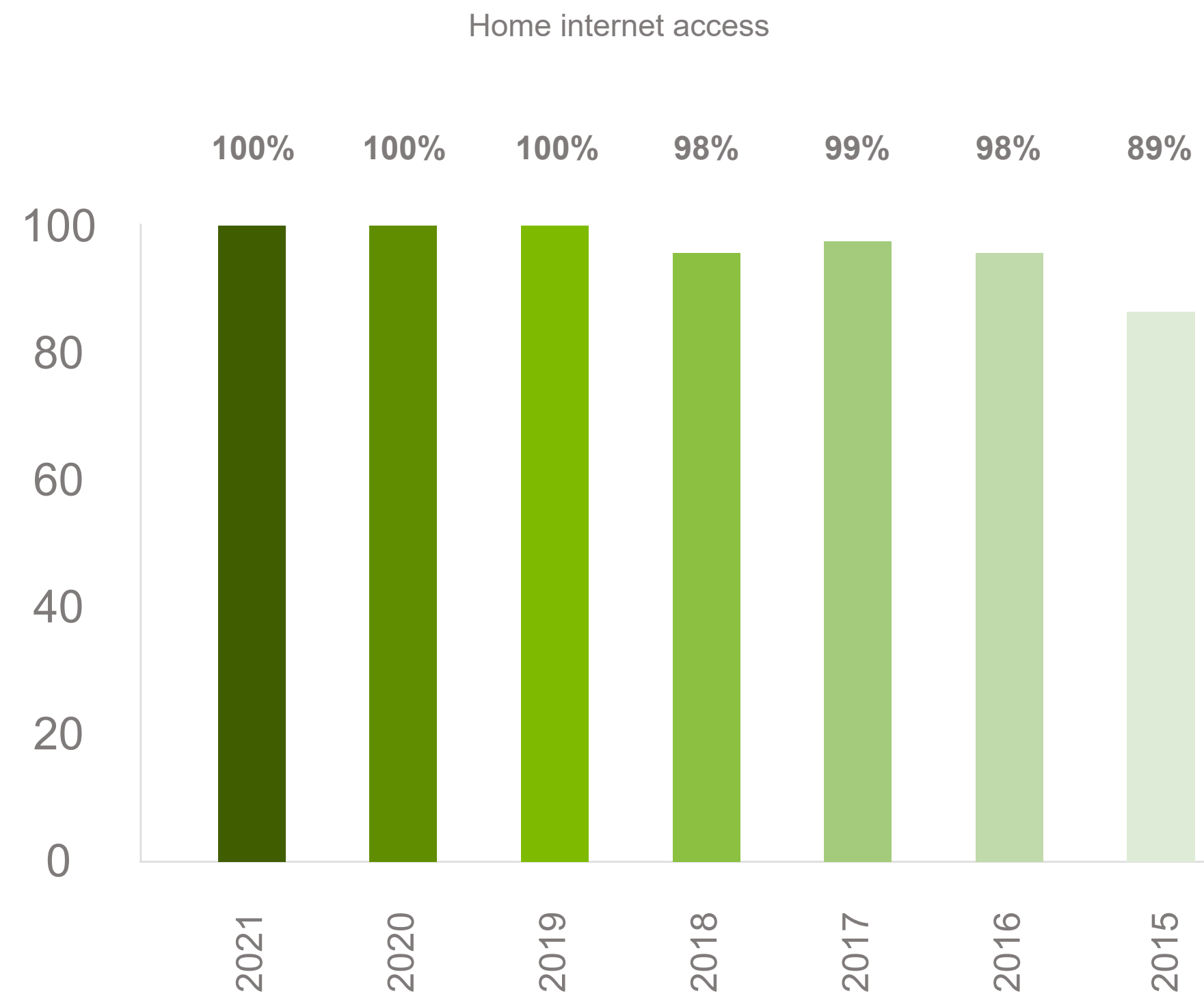
**72%**

**SATISFACTION**

Of respondents are satisfied with service provided and high satisfaction in value for money

# Respondents can access Internet from anywhere in Bahrain

## Internet access



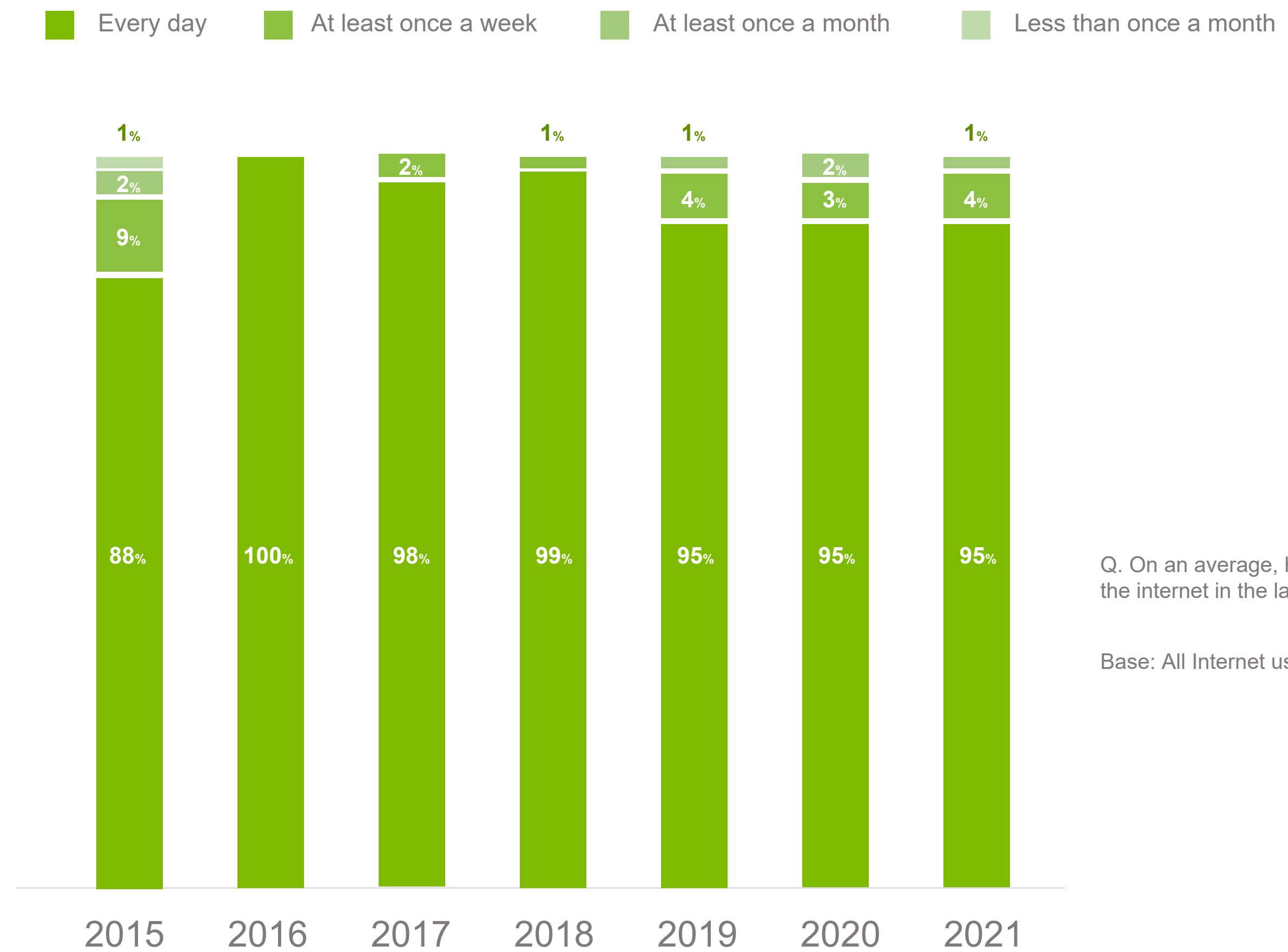
Q. Do you have access to internet at home?

Q. Have you used internet from any location in the last 3 months?

Base: All Internet users

# 95% of respondents use the Internet on a daily basis

## Usage frequency



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

Base: All Internet users

# Although most respondents use internet service from their homes, Internet usage from work and mobile phones increased in 2021

Figures in %	2015	2016	2017	2018	2019	2020	2021
Home	84%	76%	98%	87%	94%	98%	<b>94%</b>
Work	62%	58%	73%	66%	70%	48%	<b>58%</b>
Community internet access facility	20%	14%	42%	46%	23%	20%	<b>33%</b>
Another person's home	38%	20%	37%	25%	33%	26%	<b>32%</b>
Mobile						29%	<b>20%</b>
Commercial internet access facility	26%	16%	24%	35%	9%	15%	<b>17%</b>
Place of education	14%	10%	10%	34%	16%	13%	<b>7%</b>

Q. Please look at this card and tell us where did you use the internet in the last 3 months?

Base: All Internet users

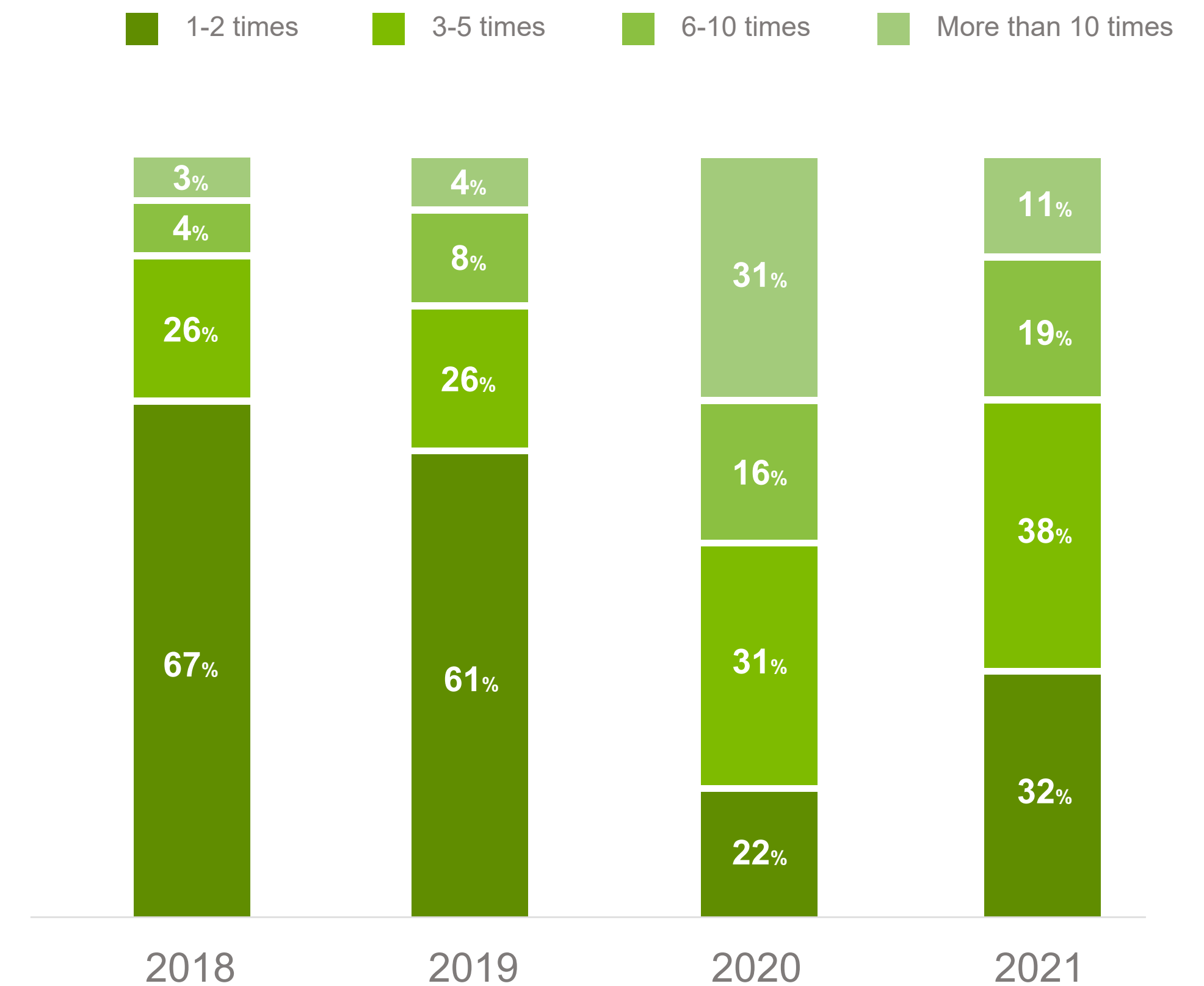
# The increased demand for online purchase during 2020 (COVID impact), has now gradually gone back to pre-COVID levels.



Q. How many online purchases did you do in the past 12 months?

Base: All who purchased online

## Frequency of online purchase: last 12 months



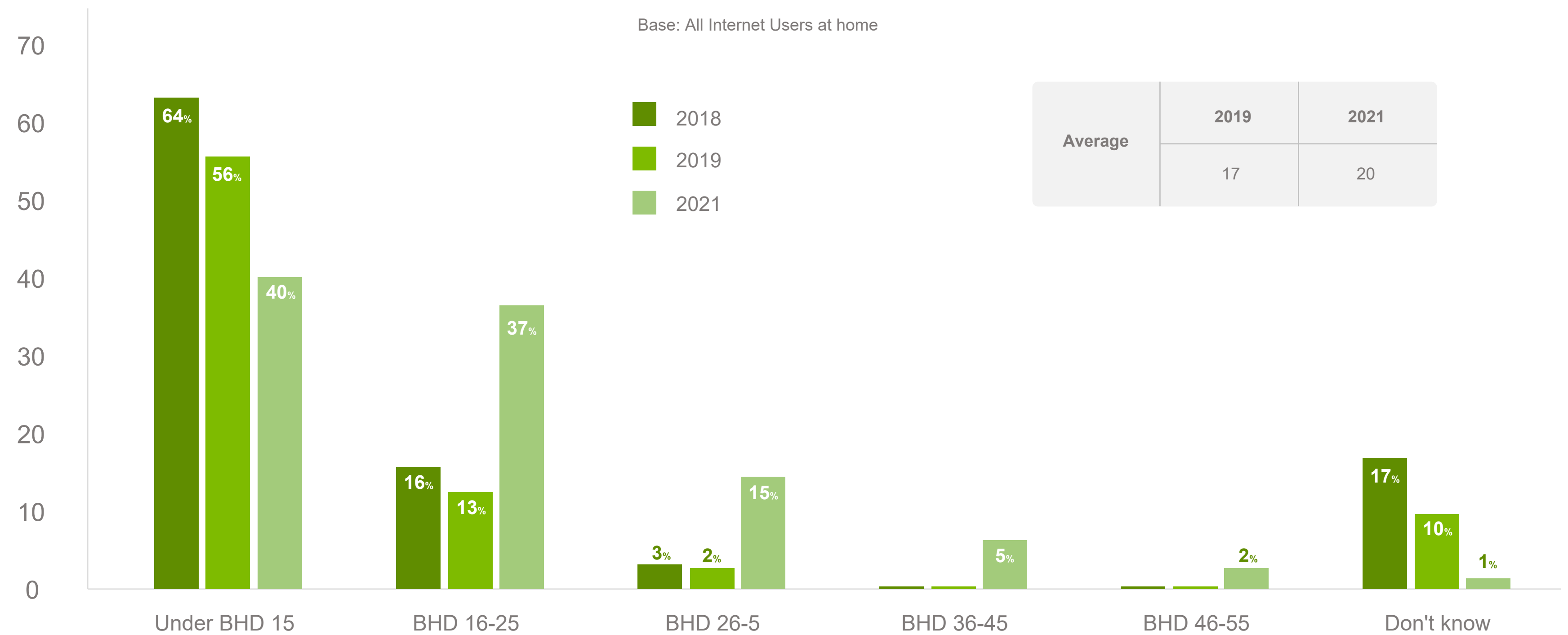
# Overall spending on Internet service has increased over years



## Average monthly spend on Internet

Q. How much on an average, do you spend on home internet services each month?

Base: All Internet Users at home



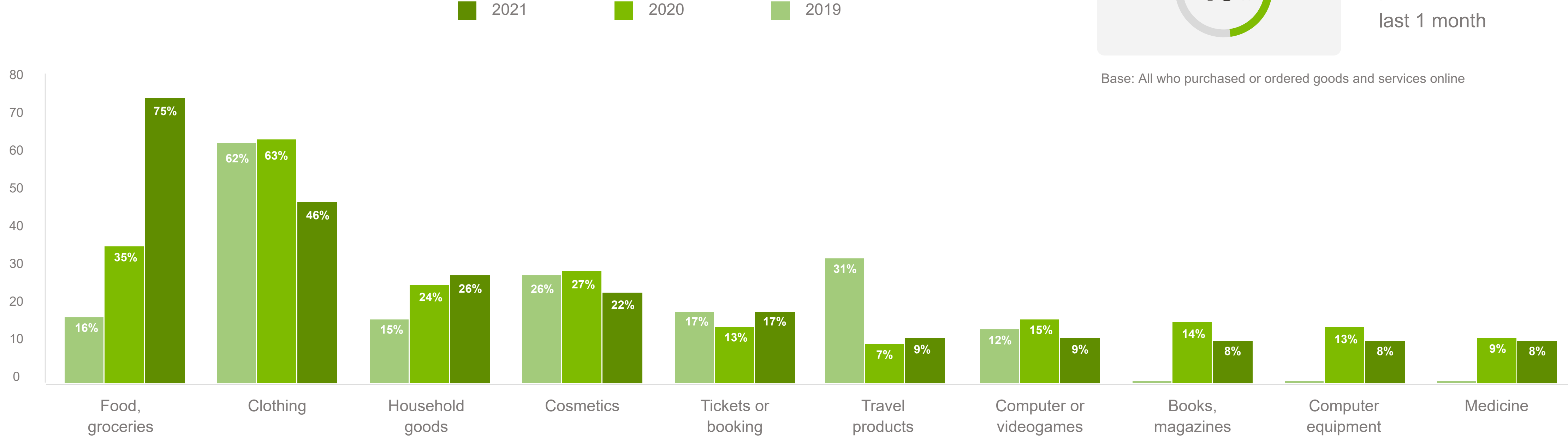
Average	2019	2021
	17	20

# Online shopping pattern moved towards necessities like Food & Grocery items

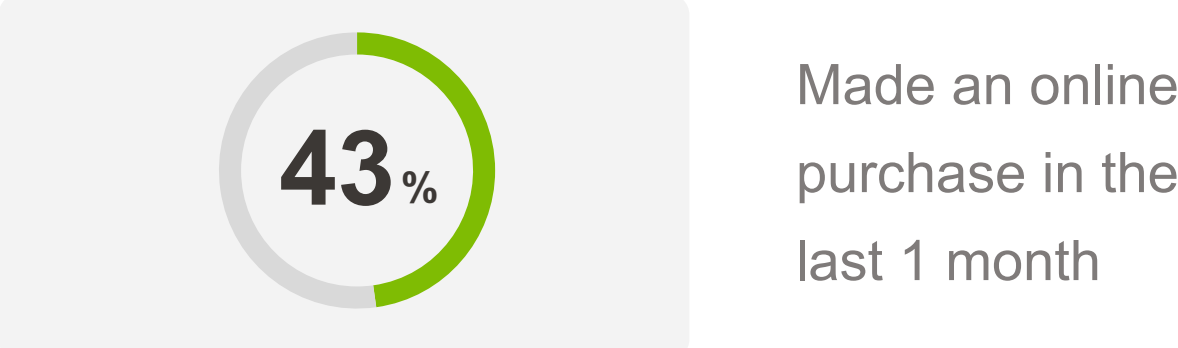
## Type of online purchase

Q. When did you last buy or order goods or services over the internet?  
 Q. What types of goods or services did you buy or order over the Internet for private use in the last 3 months?

Base: All who purchased online



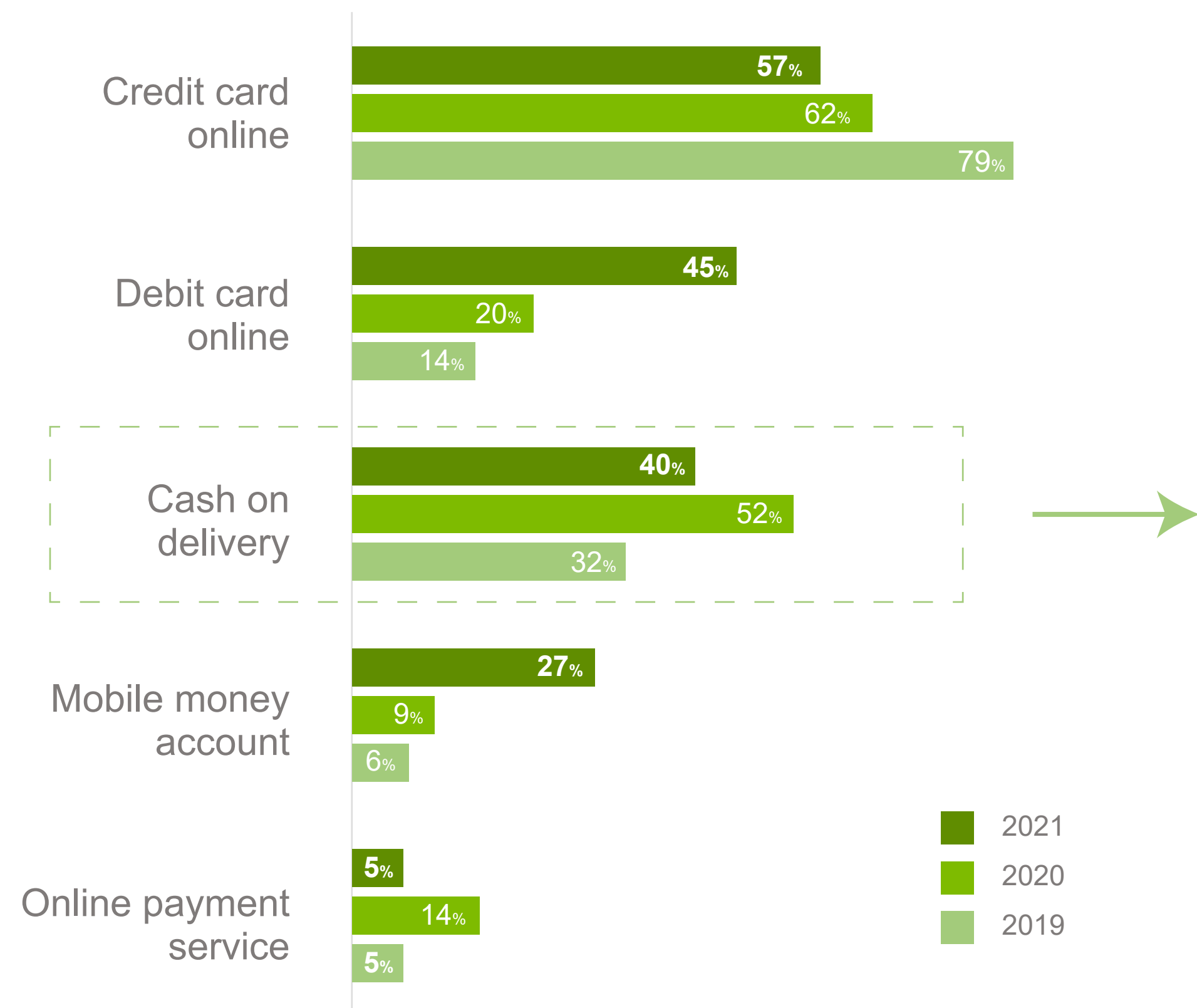
## Last online purchase



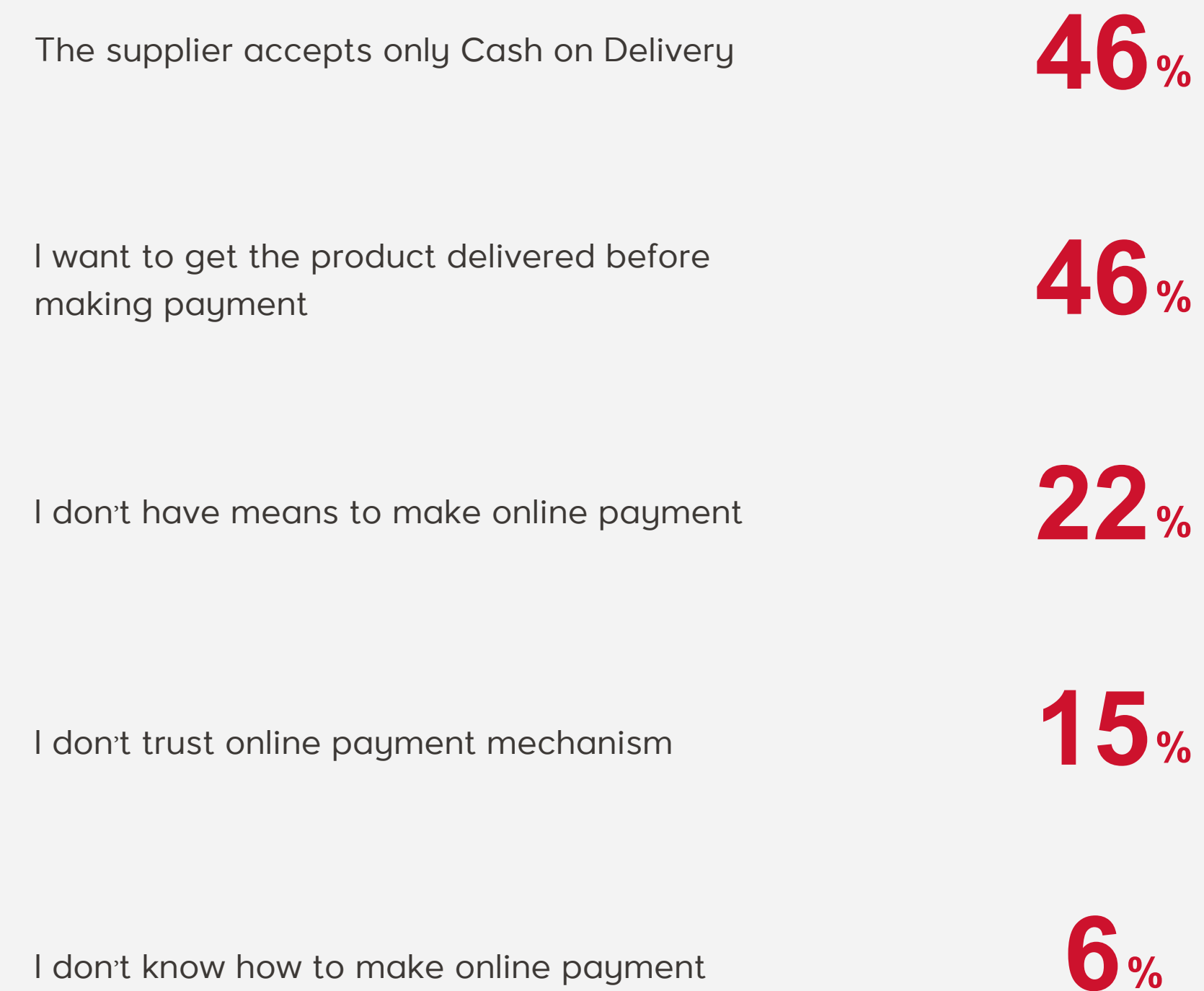
Base: All who purchased or ordered goods and services online

**Credit card continues to be the most used method for online purchases. Also, increase in debit card usage in 2021. Cash on delivery is mainly used if required by suppliers and for reassurance once product is delivered**

### Mode of payment



### Reasons for cash on delivery



Q. How did you pay for the product or service you bought online during the last 12 months?  
 Q. Why did you choose to make Cash On Delivery payment instead of online payment?

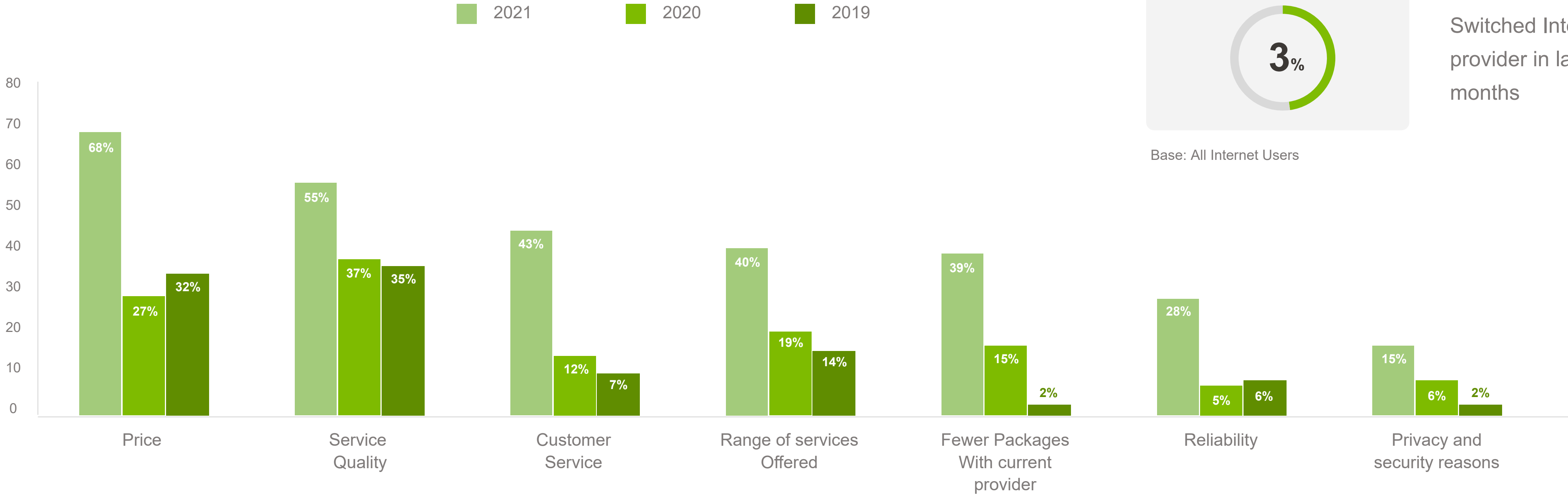
Base: All who purchased online

# Reasons for switching internet provider are largely price & Quality related

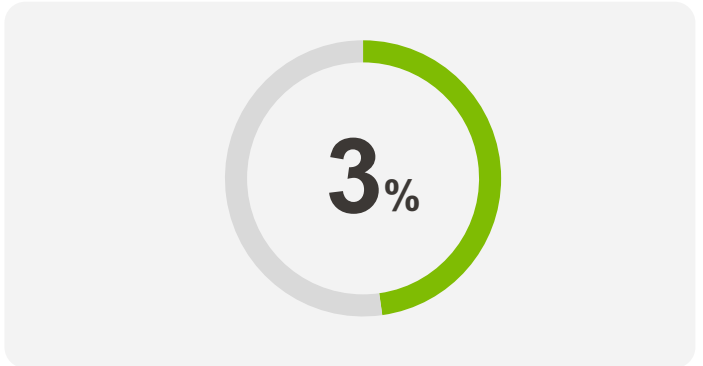
## Reasons for switching internet service provider

Q: Have you switched your internet service provider in the last 12 months?  
 Q: Please tell the reasons for switching your internet service provider

Base: Those who switched Internet service providers



## Switching internet provider



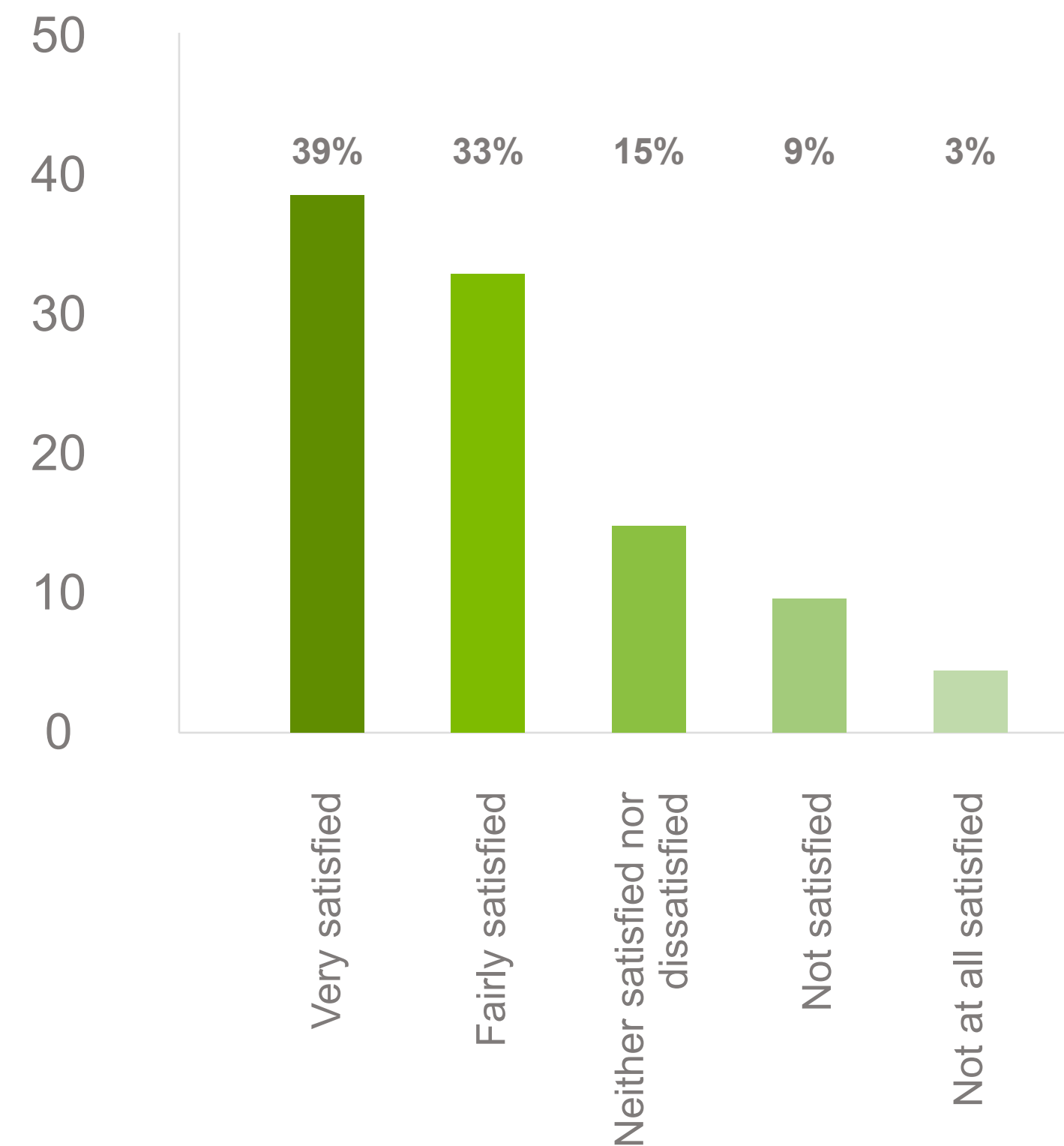
Switched Internet provider in last 12 months

Base: All Internet Users

# Overall Internet satisfaction continues to be rated high due to value perception and variety of internet speed packages available



## Satisfaction with Internet services



**2021**

**MEAN 3.97**

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

*\*Some attributes are not put in 2020 because of change in methodology*

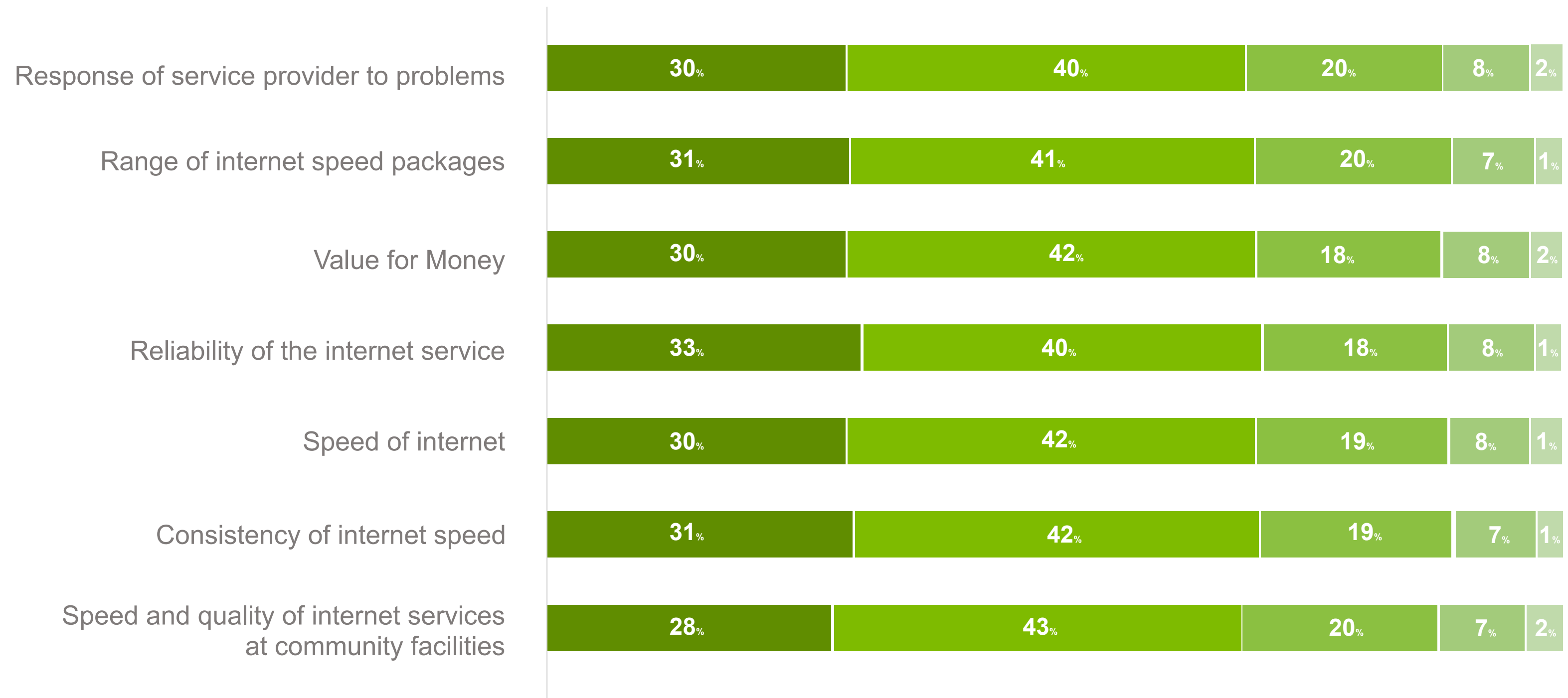
*\*\*Don't Know Mentions Not Shown. Will not add to 100% before 2021*

Base: All Internet users

# Overall Internet satisfaction is driven by value perception and variety of internet speed packages available

## Satisfaction with Internet services

- Very satisfied
- Fairly satisfied
- Neither satisfied nor dissatisfied
- Not satisfied
- Not at all satisfied

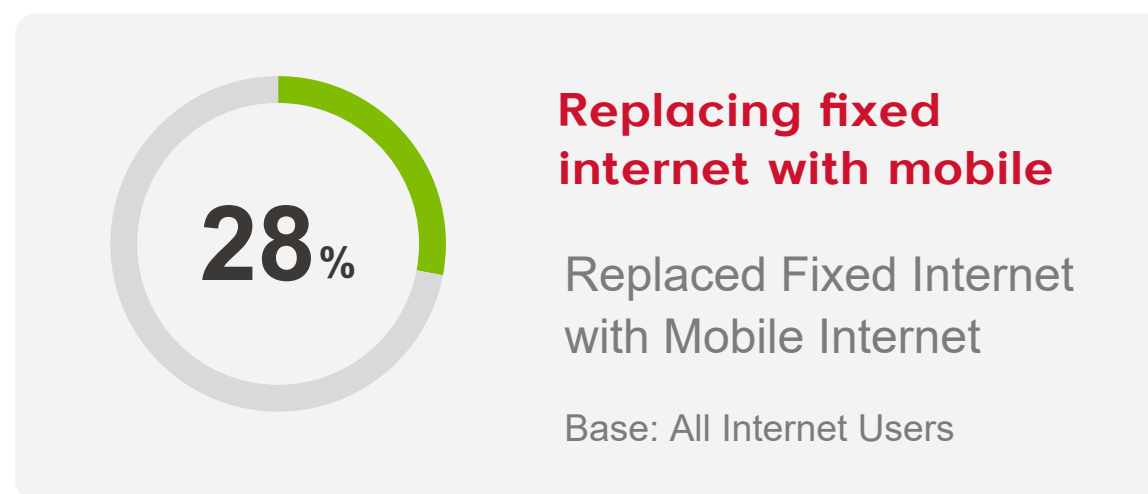


Q. How satisfied are you with the following elements of your Internet services?

*\*\*Don't Know Mentions Not Shown. Will not add to 100% before 2021*

Base: All Internet users

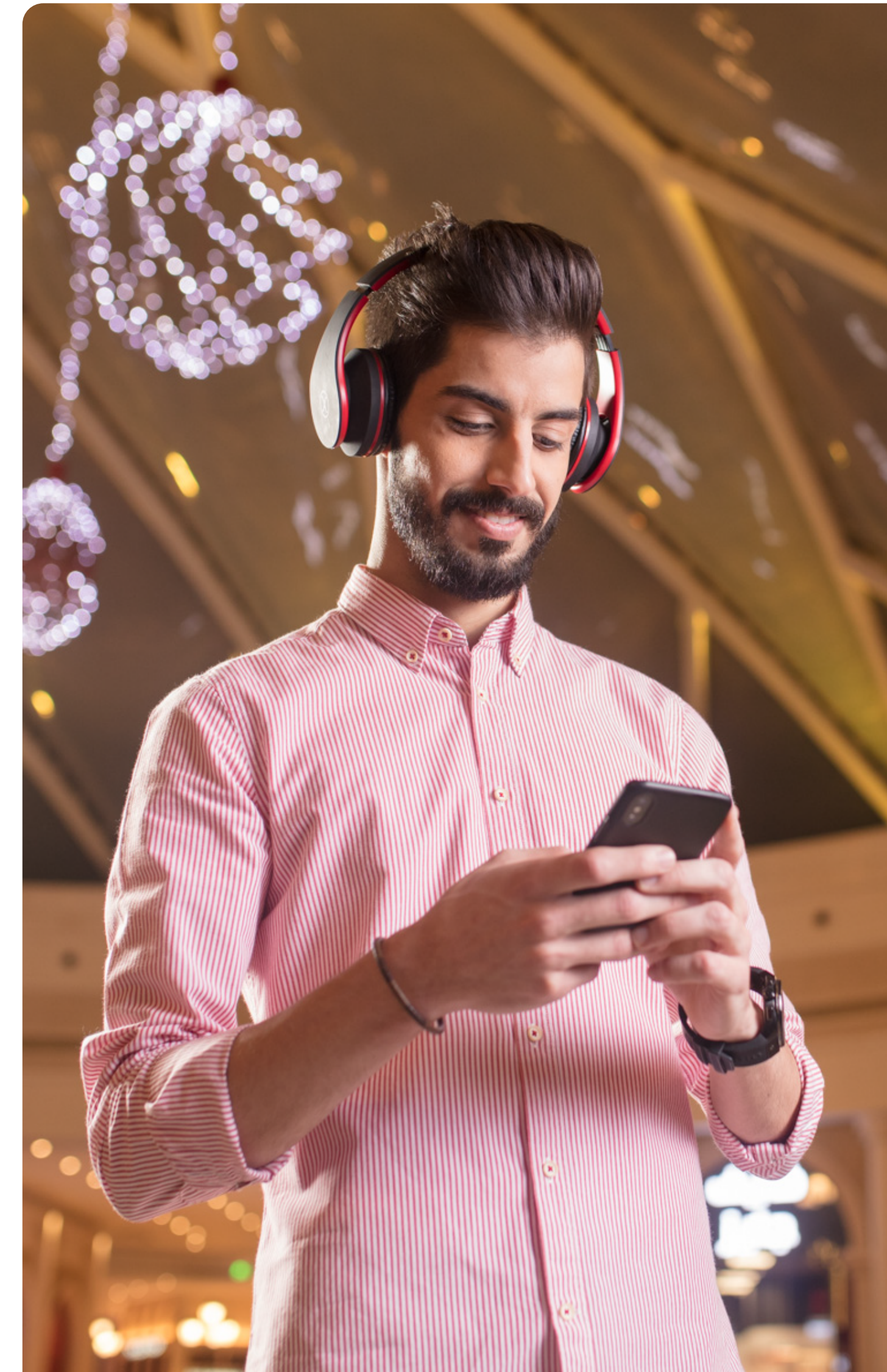
# Reasons for considering replacing fixed internet with mobile is mainly Price related



## Reasons to consider replacing fixed broadband with a mobile broadband service

Q: Have you ever replaced your fixed broadband service with Mobile broadband service?  
Q: What were some of the reasons that might push you to replace fixed broadband with a mobile broadband service?

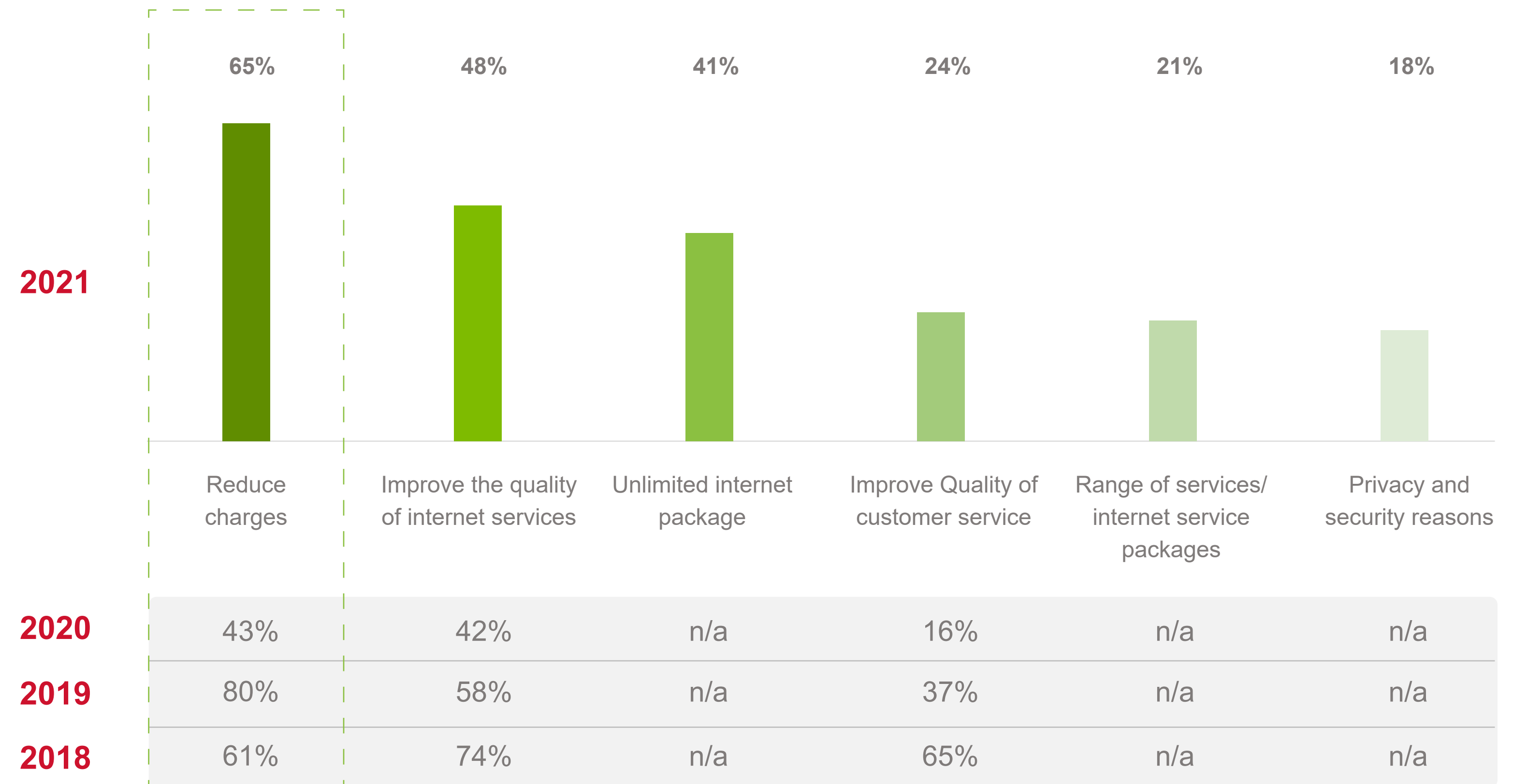
Base: Who Haven't replaced Fixed Broadband With Mobile Broadband



# Reduced charges is the main area of improvement along with better Internet service quality



## Suggestions to improve Internet services



Q. Could you please tell me if there are any suggestions you would like to make to help serve you better in the future for internet?  
 \*attributes are not put in 2020 because of change in methodology

Base: All Internet users

05

# OTT Applications

Bahrain Telecommunications Survey  
2021 (Residential)

# OTT Applications

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## Scope

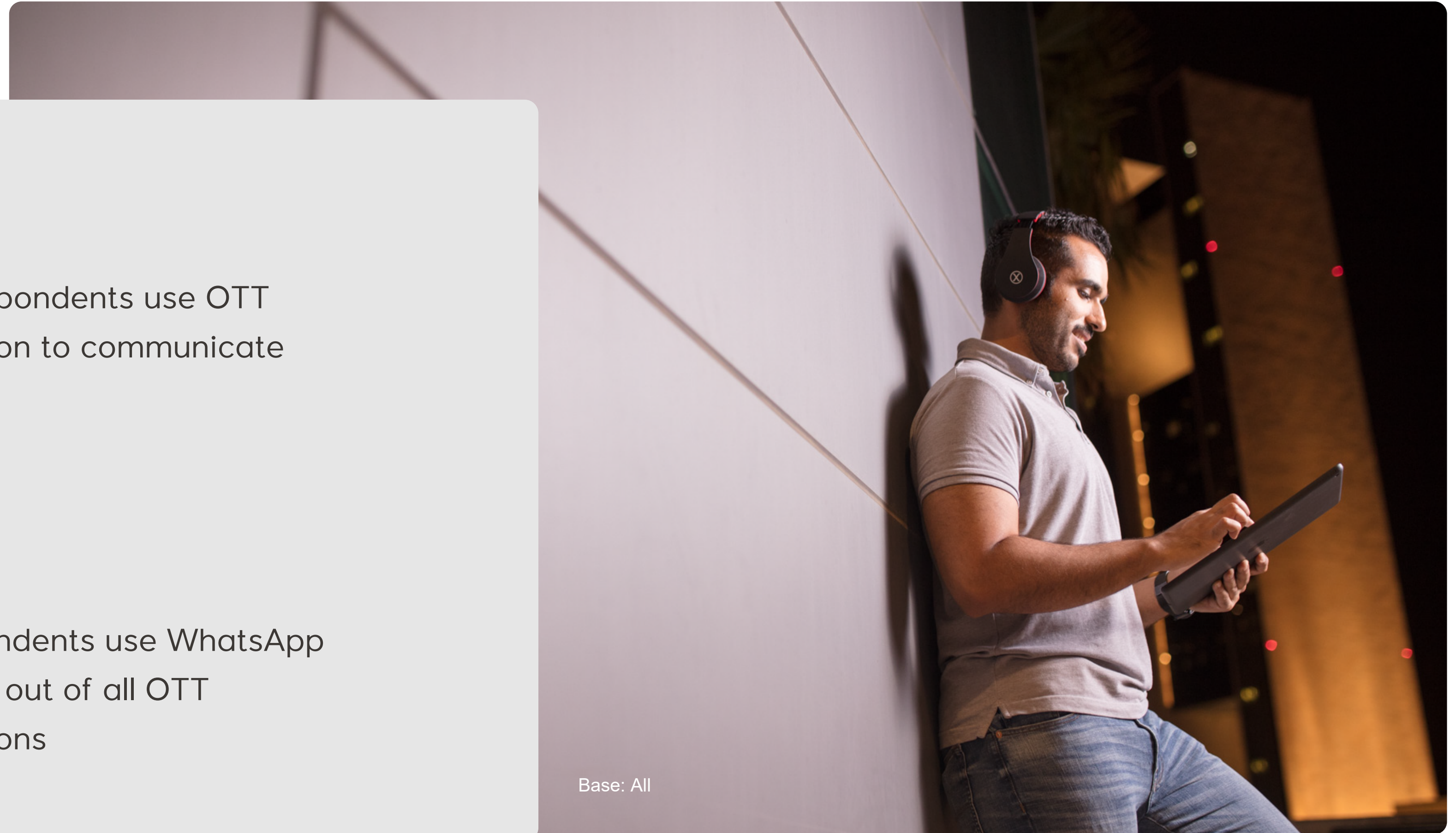
All of respondents use OTT application to communicate



## Usage

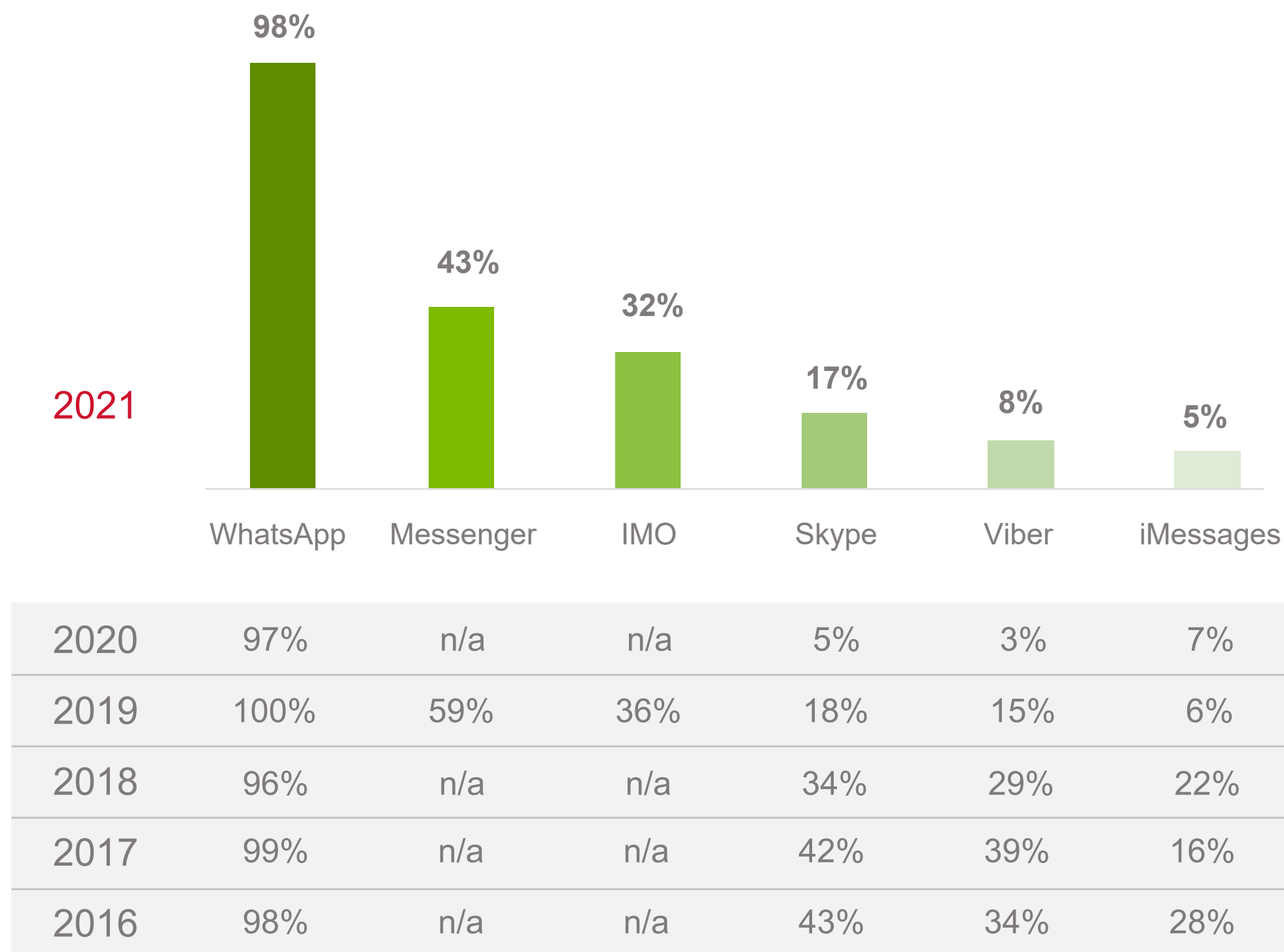
Of respondents use WhatsApp the most out of all OTT applications

Base: All



# WhatsApp remains the lead OTT app with other apps like messenger competing for screen time along with it, SMS usage is stable since last year

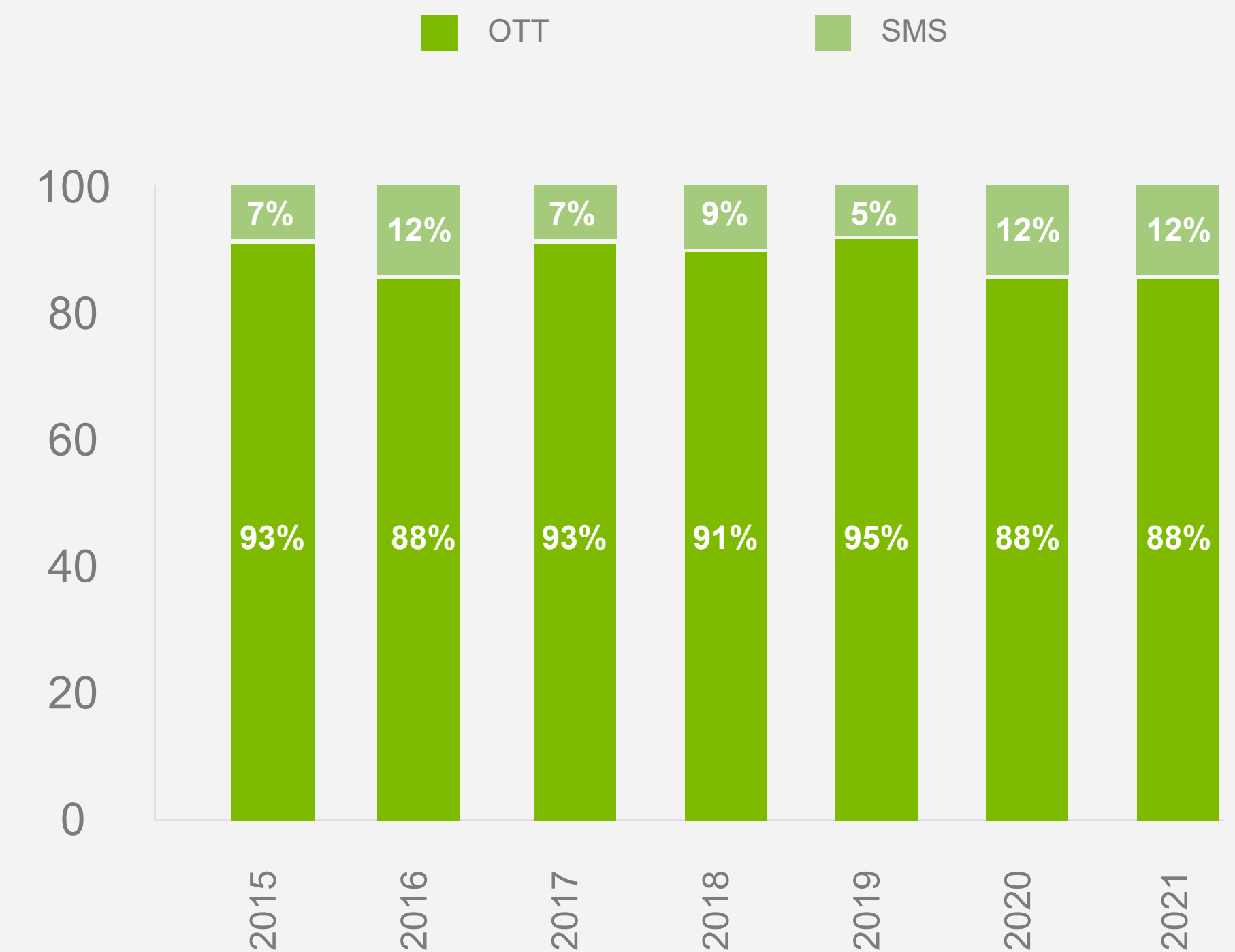
## OTT apps used



Q. Which of these means of communication do you use to communicate with friends and family (In Bahrain or outside of Bahrain) at least once a day? Base: All

Q. What proportion of your messaging do you do via SMS or by OTT instant messenger apps (Skype, Viber etc.)

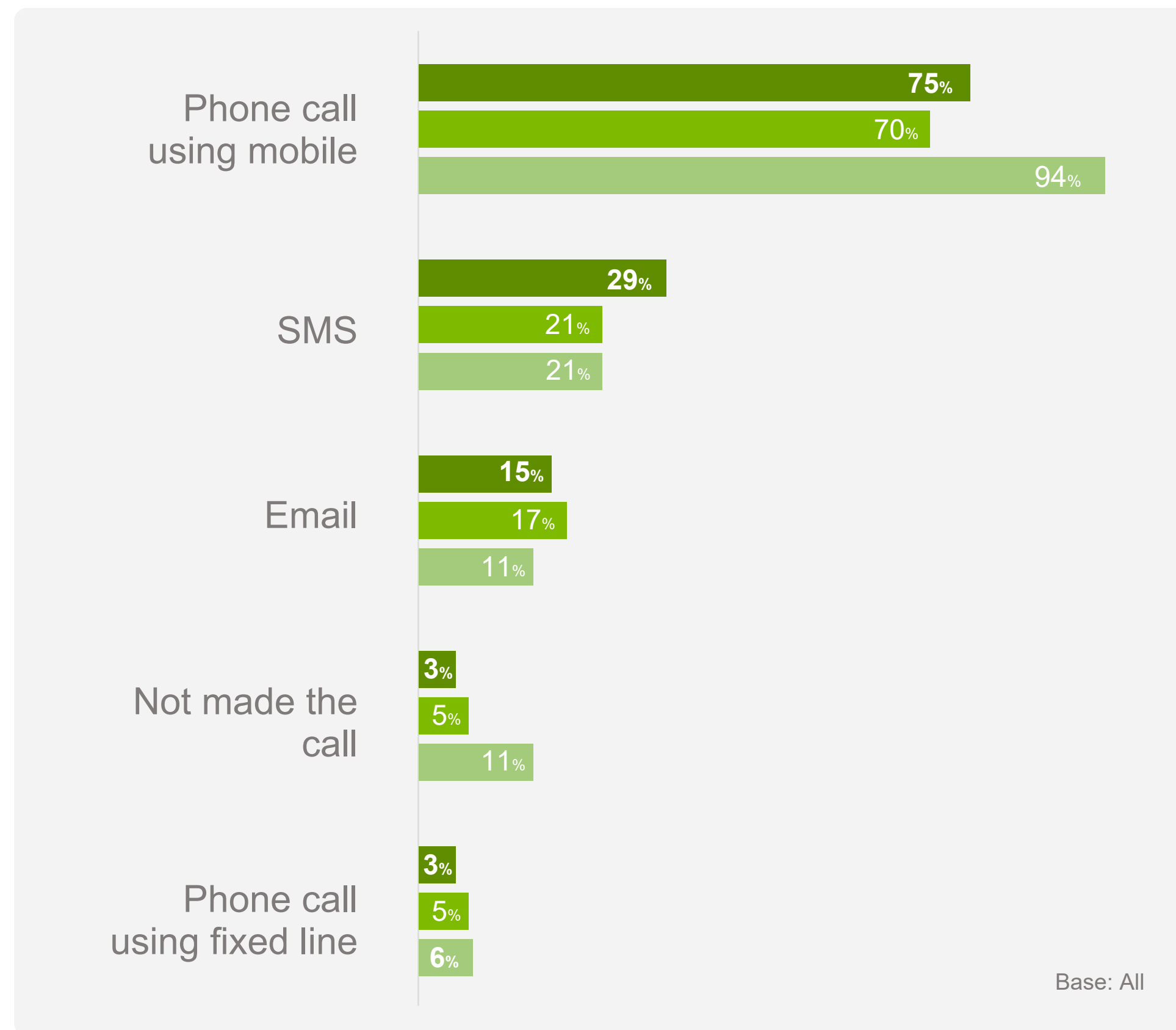
## Proportion of messaging – OTT vs SMS



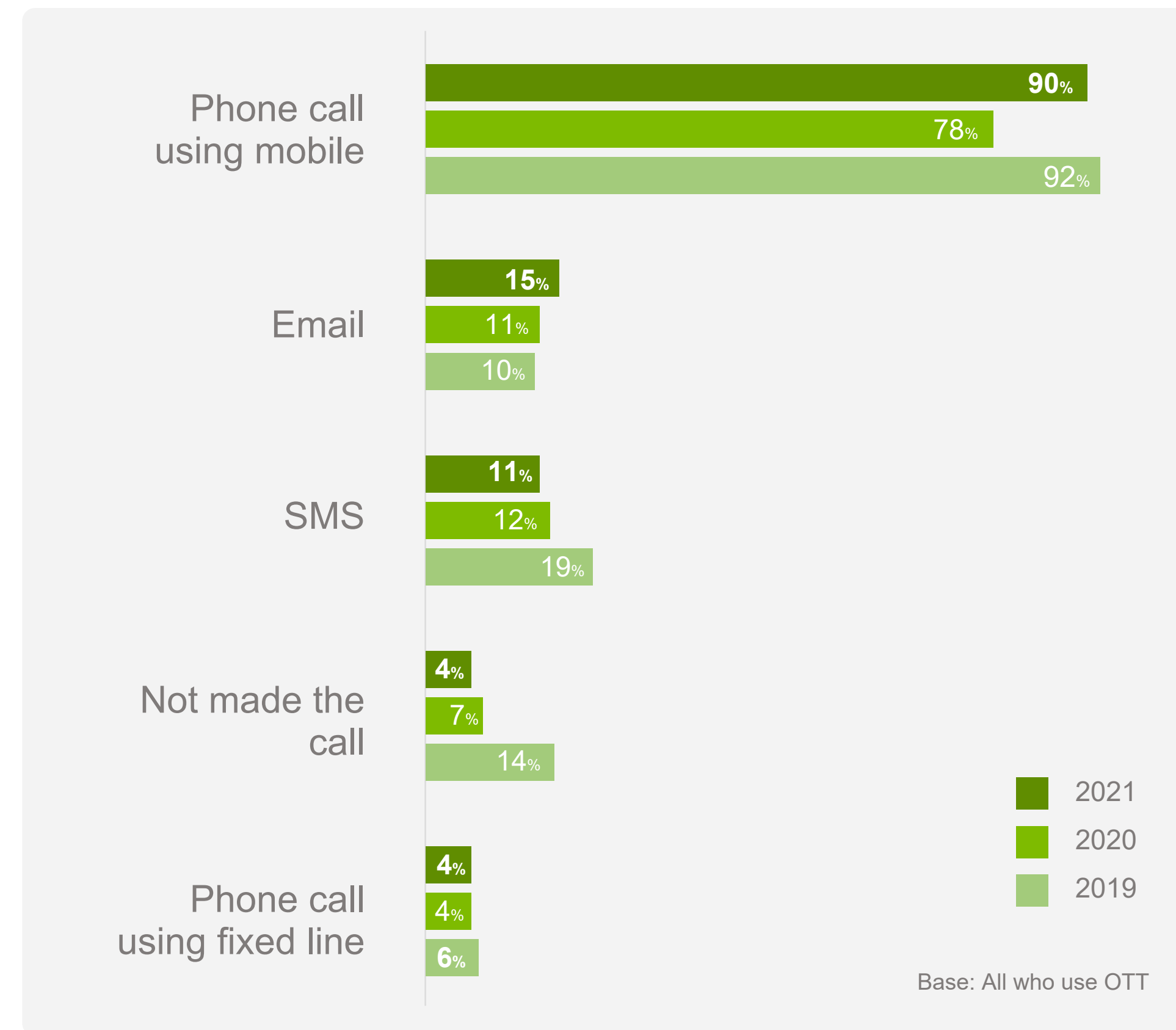
Base: All who use OTT

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

What if instant messaging apps are not available



Reasons for cash on delivery



Q. Consider the last time you used an IM service (ex. WhatsApp etc.) to communicate, in the absence of that service what would you have done?  
 Q. Consider the last time you used an OTT app (ex. Skype, Viber etc.) to make a call, in the absence of that service what would you have done?

06

# International Calling

Bahrain Telecommunications Survey  
2021 (Residential)

# International calling

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## Countries

Asian countries and GCC countries i.e. KSA, UAE and Kuwait are the most popular calling destinations



## Mediums

Of respondents use OTT apps to make international calls

**80%**



## Roaming

Of respondents use their local mobile service provider while travelling

**8%**

# OTT apps is the preferred way of making international calls

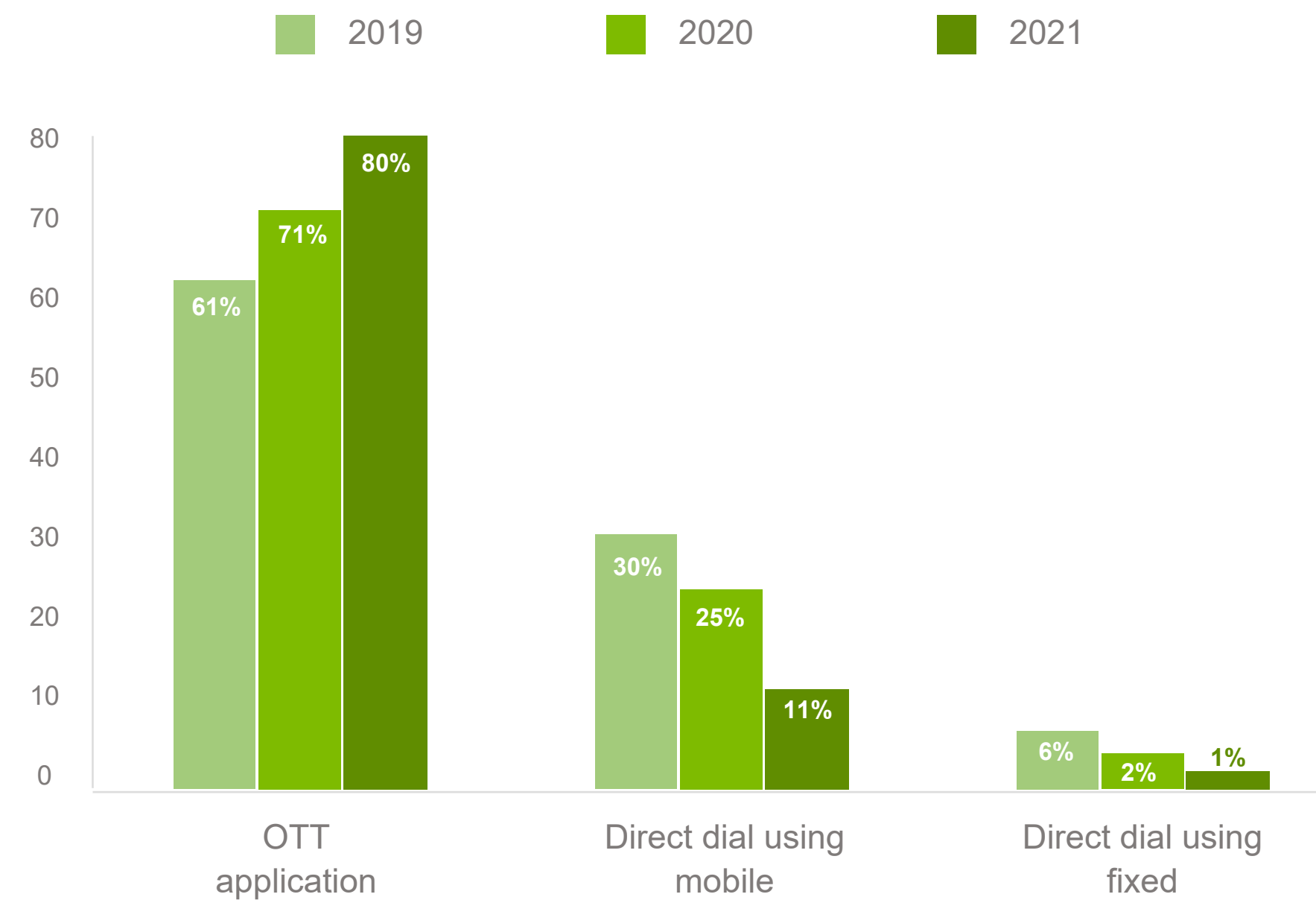
## International calls are mainly with either Asian or other GCC countries

### Methods used to make international calls

Q. Putting aside for the moment how you pay for international calls, which of these possible options do you use most often to make international calls?

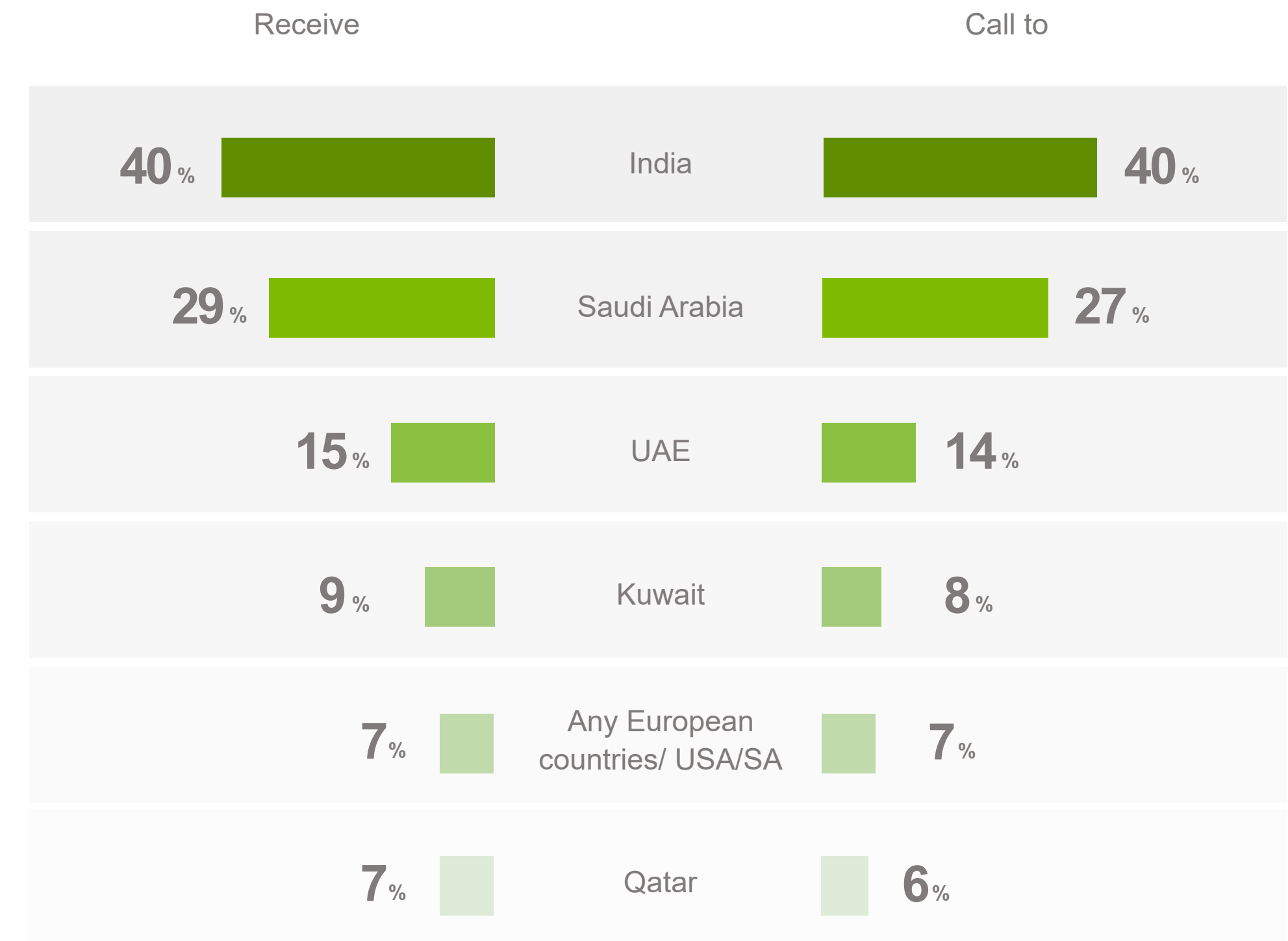
Q. Which countries do you regularly receive calls from on each of the following methods?

Q. Which countries do you regularly call from each of the following methods?



Base: those who receive/make international calls

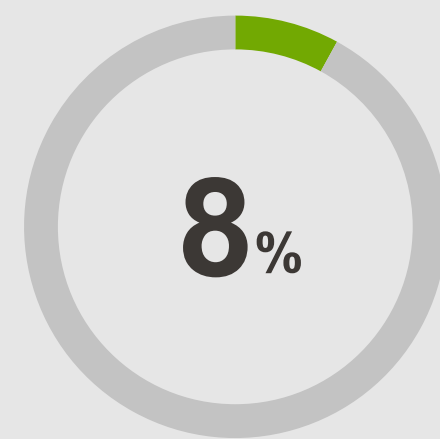
### Countries to / from which international calls are made



# Respondents who used roaming services prefer using a mobile roaming plan



## Roaming Service

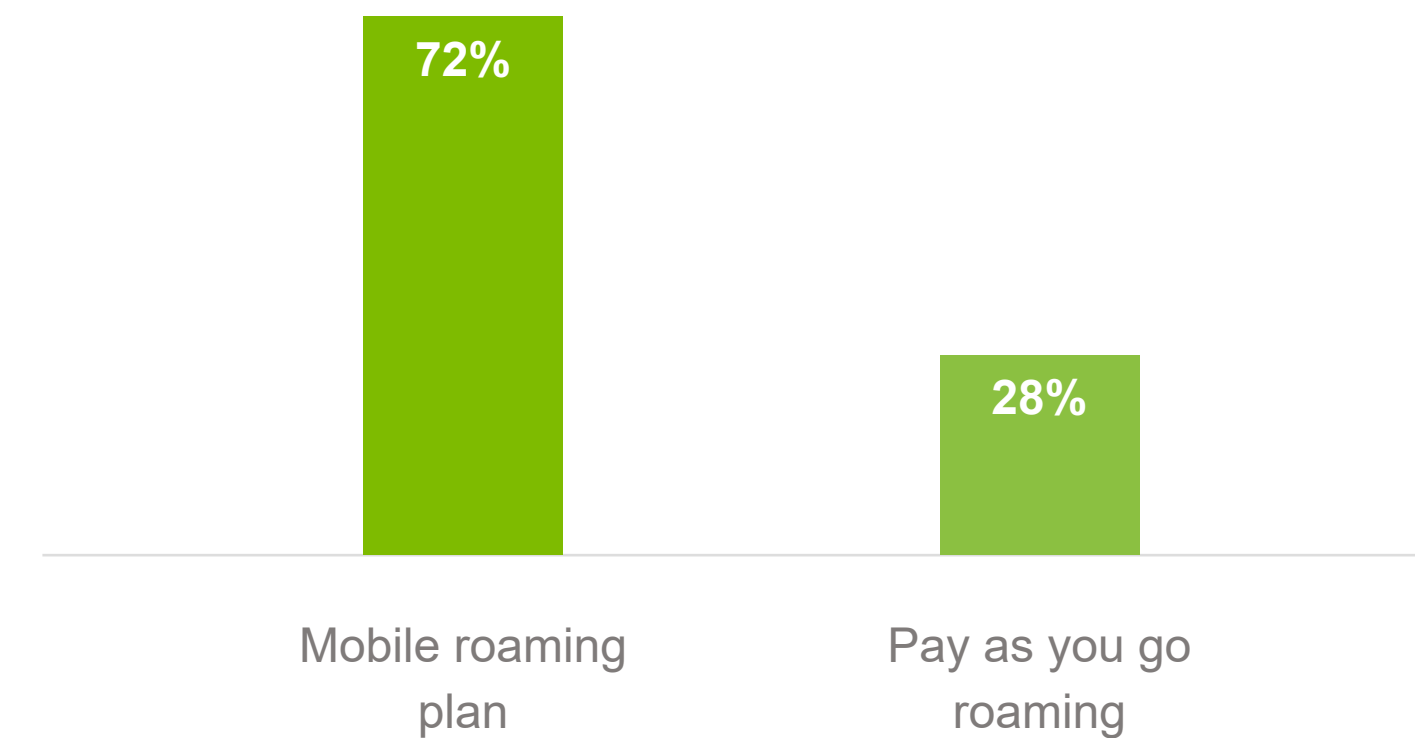


Used Roaming services via their Bahrain SIM card

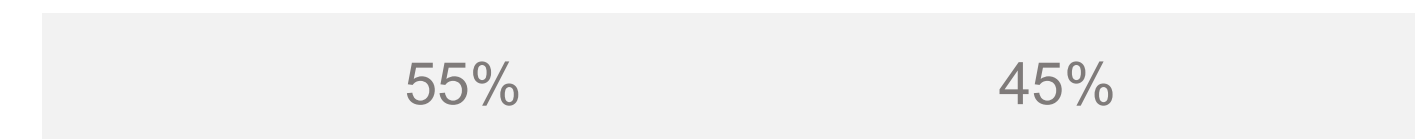
Base: All Home Internet Users

## Types of mobile roaming service used in last 12 months

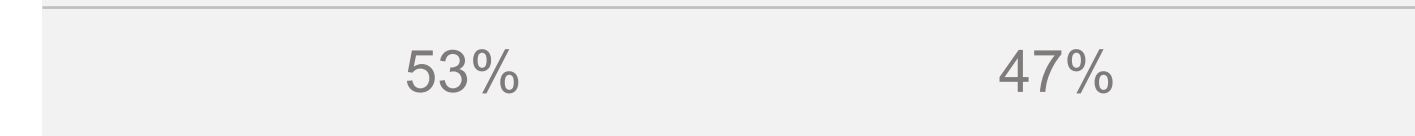
2021



2019



2018



Q. Have you used mobile roaming services from your current provider i.e. used mobile services outside Bahrain in the past 12 months?

Q. You said that you have used mobile roaming service. Could you please tell me which mobile roaming service did you use?

Base: those who used roaming services

# THANK YOU

Bahrain Telecommunications Survey  
2021 (Residential)

