

TELECOMMUNICATIONS SERVICE MARKET SURVEY

2022 - Residential results

October 2023

NIQ

هيئة تنظيم الاتصالات
TELECOMMUNICATIONS REGULATORY AUTHORITY
مملكة البحرين - Kingdom of Bahrain



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Survey objectives

Bahrain Telecommunications Survey 2022
(Residential)

The key objectives of 2022 telecommunications Services Market Survey



Understand the level of **access** and **usage** for telecommunications services in Bahrain



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



Assist the Authority in its decisions to take appropriate regulatory action.



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



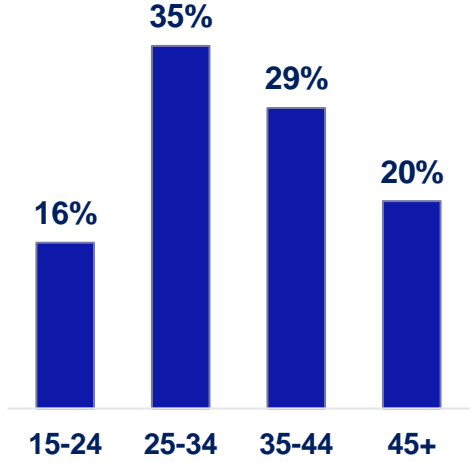
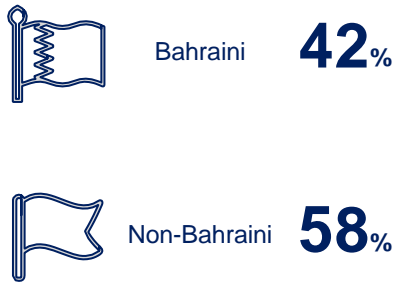
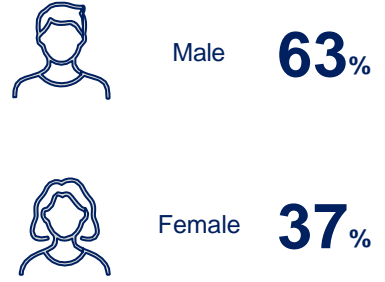
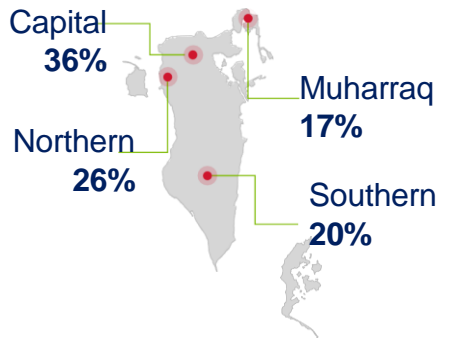
Survey Sample Distribution

Bahrain Telecommunications Survey 2022
(Residential)

Sample Coverage

1665 Face to Face interviews have been conducted among residents of Bahrain in 2022. The sample distribution was based on Bahrain population distribution with age 15 years old and above.

GOVERNORATES GENDER NATIONALITY AGE GROUP



Key Findings of the survey

Bahrain Telecommunications Survey 2022
(Residential)

Residential Survey 2022: Hey Highlights



100% Ownership of Mobile Phone

100% Ownership of Smart Phone

96% of respondents use Mobile data

Mobile Services



100% Of respondents access to internet at home

100% of respondents used internet in last 3 months

98% of respondents using internet daily

Internet Service



87%
of respondents use OTT App to make international calls

International Calling



87% of respondents are satisfied with Mobile Services

87% of respondents are satisfied with Internet services

Customer satisfaction

Mobile Services

Bahrain Telecommunications Survey 2022
(Residential)

Mobile Service Usage Summary



100%

ACCESS

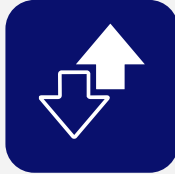
All respondents use Mobile services



100%

SMART PHONE

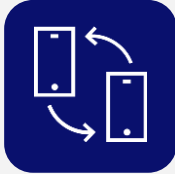
All respondents own smart phone



96%

MOBILE DATA

Of respondents use mobile data to access internet



9%

SWITCHING PROVIDERS

Of respondents switched their mobile phone provider in last 12 months



87%

SATISFACTION

Of respondents are Satisfied with the overall Mobile services.

Mobile Internet Usage and Activities

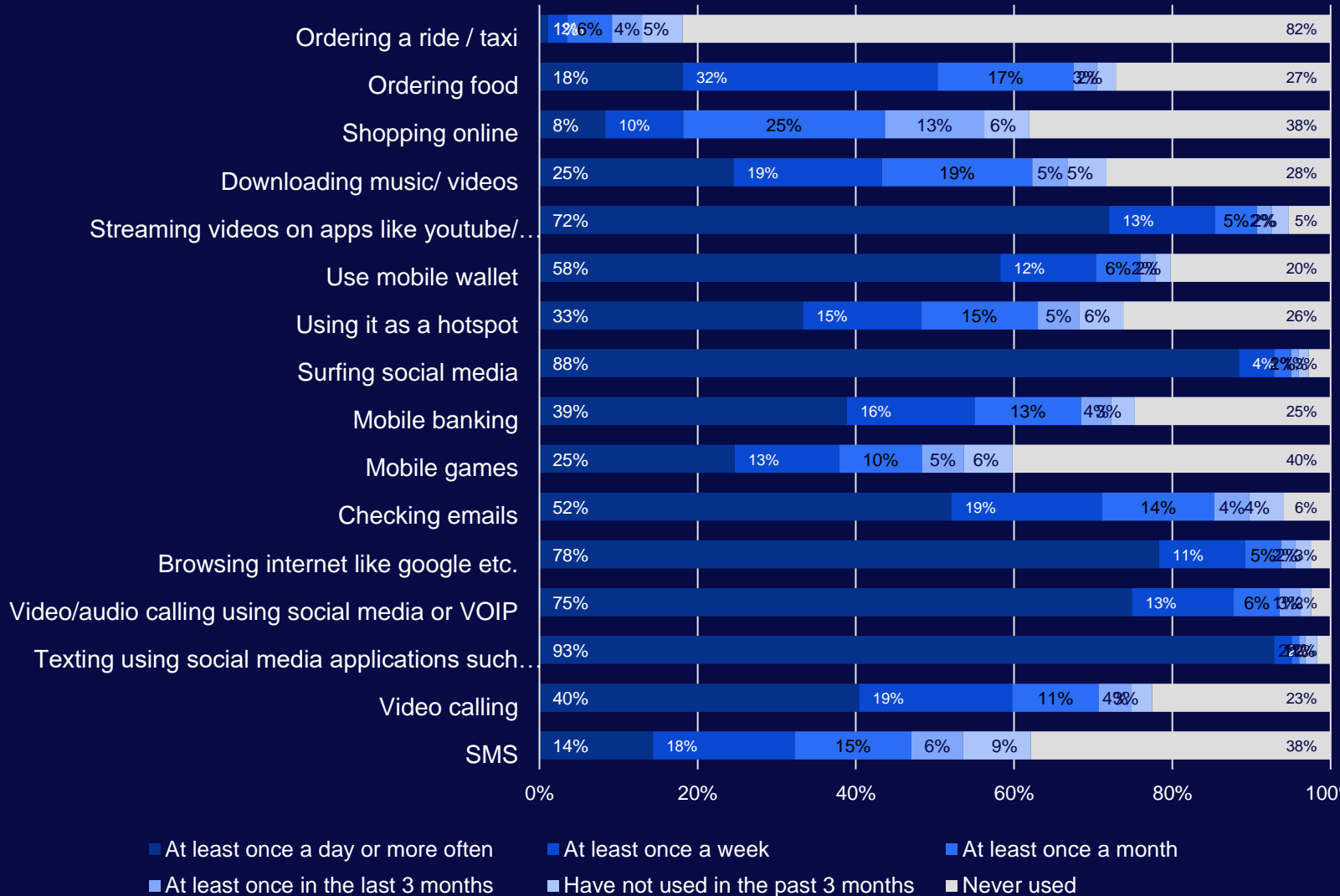
Access to a Mobile phone



96% Of respondents use internet though mobile data

81% Of respondents use internet through wifi on mobile

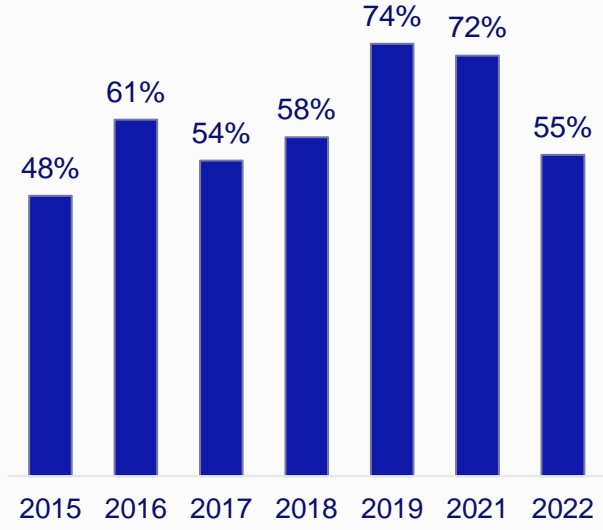
Frequency of activities through mobile



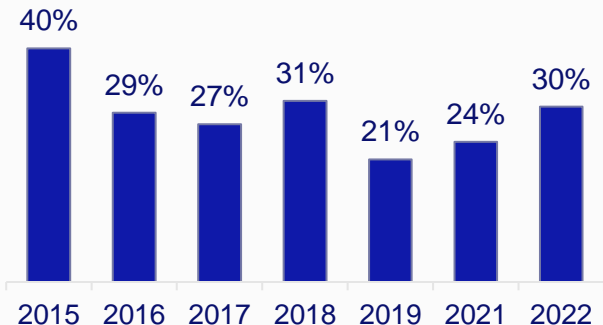
Average monthly expenditure – Mobile services

Average monthly spend on mobile has increased during 2022.

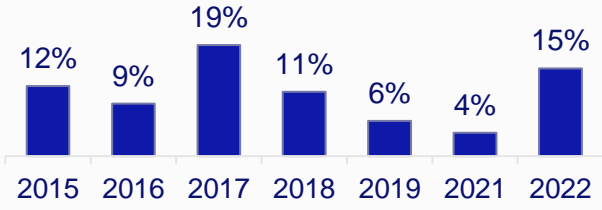
Less than BD 10



BD 10.1 – BD 20



More than BD 20



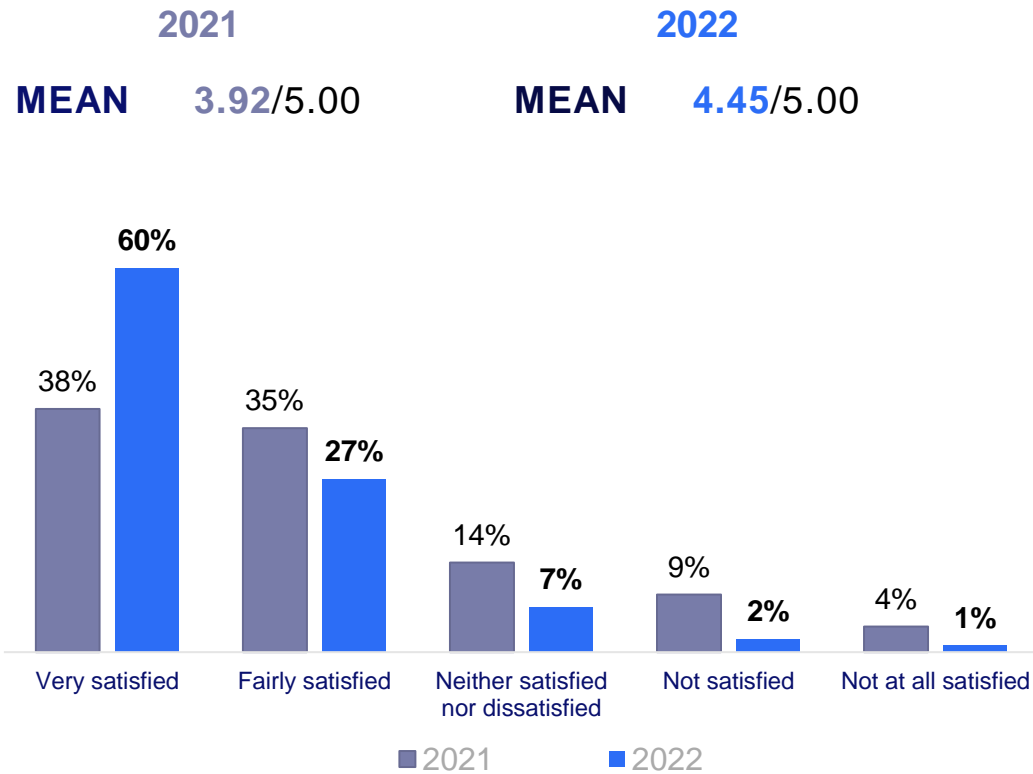
Q. What is your household's average monthly bill on mobile services?
Base : All

Overall Satisfaction : Mobile services

87% of respondents are satisfied with overall mobile services, satisfaction has increased from the past year.

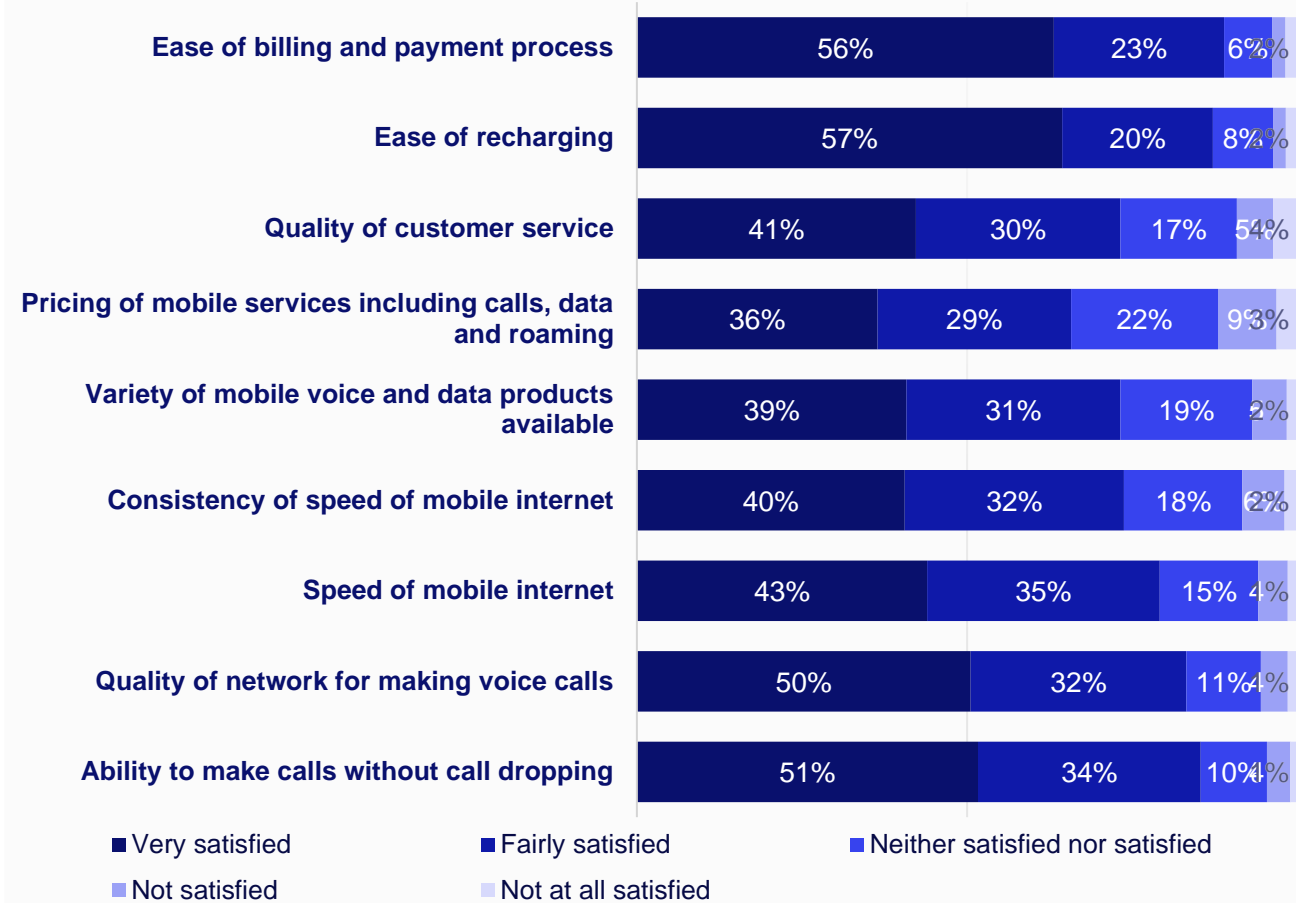
Ease of bill-payment and recharging process, followed by voice-network quality appeared to be gathering maximum satisfaction.

Overall Satisfaction



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

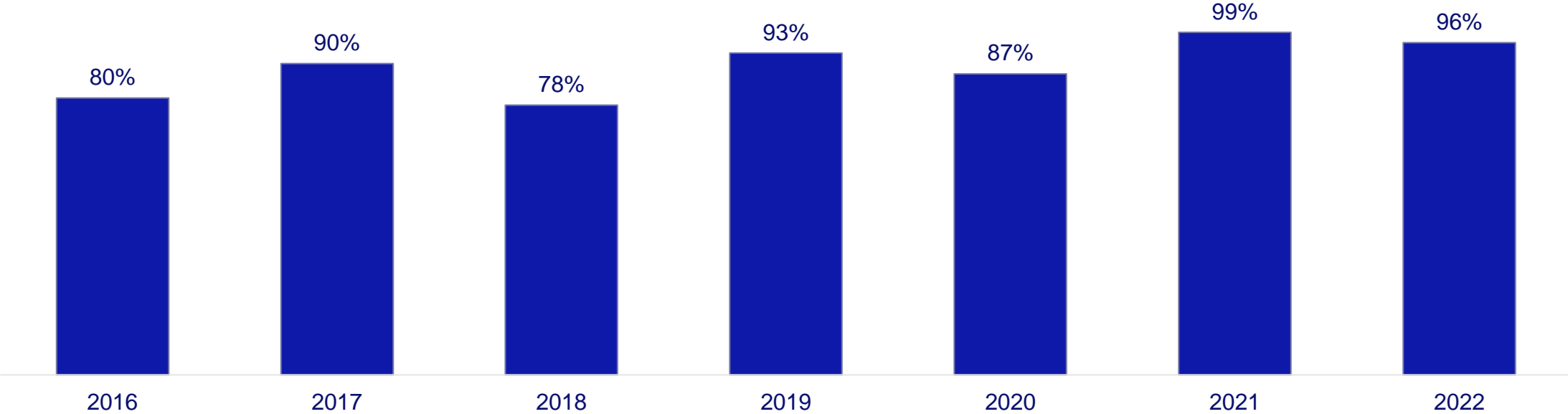
Satisfaction by Service Attributes



Usage of Mobile Data

Usage of Mobile Data usage continues to remain very high.

Use Internet vis Mobile Data



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

Overall Usage & Satisfaction : Mobile Data

Satisfaction with mobile data has also increased vs. last year.

Satisfaction with mobile data service



Satisfaction with connectivity, pricing, Quality of customer service and variety of mobile products has recovered in 2022, particularly among Bahrainis

Top Box: Very satisfied %	Mobile data connectivity	Price of mobile data	Variety of mobile voice and data products	Quality of customer service
2022**	40%	36%	39%	41%
2021*	30%	24%	30%	27%
2020*	51%	26%	44%	36%
2019	38%	28%	28%	35%

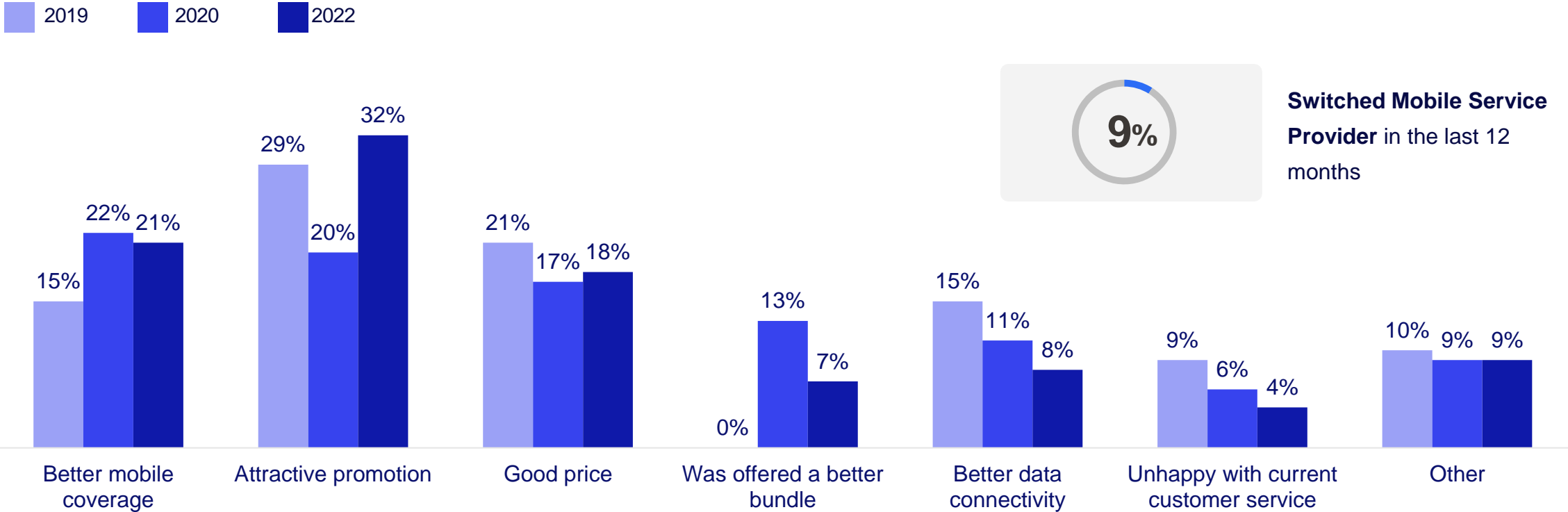
Base : All mobile data users

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

*Calibrated mean scores
 **In 2022 Mobile Data Connectivity refers to consistency of speed

Switching mobile service providers : Key factors

Attractive promotion & pricing and better mobile coverage are the key reasons for switching between mobile providers



Q. Have you switched between mobile providers in the last 12 months where you do not use the previous provider anymore?

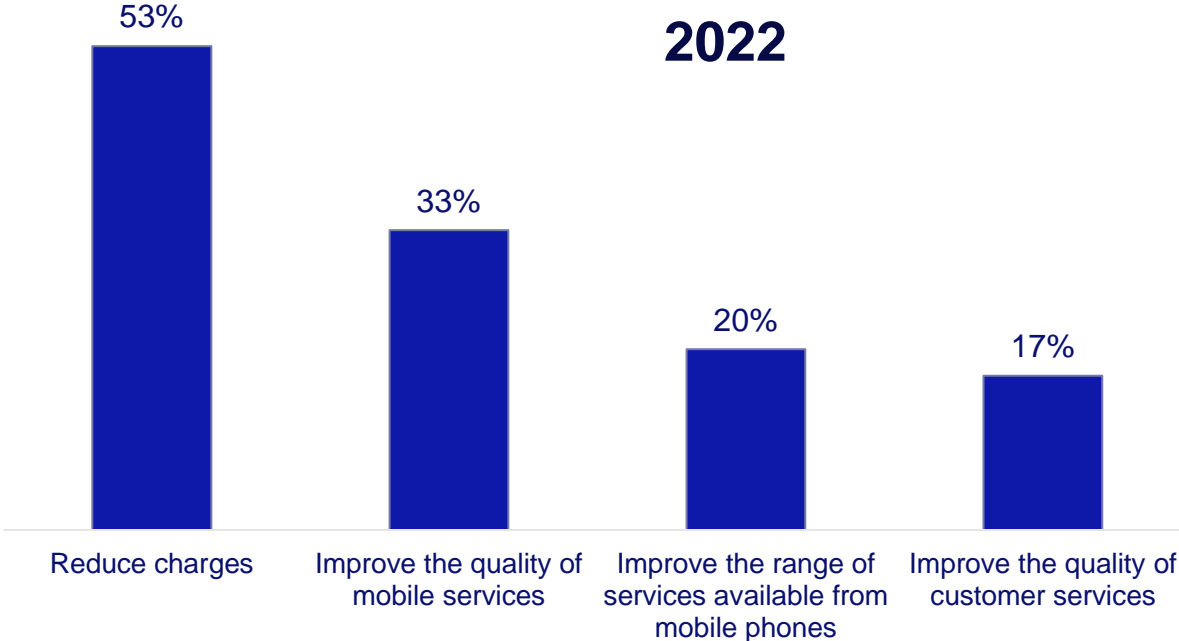
Q. Please tell me what was the most important reason for which you have switched your mobile service provider?

**attributes are not put for 2021 because of change in methodology*

Base: All Who Switched Between Mobile Providers

Enhancing Mobile Services: Suggestions for Improvement

For mobile services, pricing remains the key improvement area suggested by the respondents



Year	Reduce charges	Improve the quality of mobile services	Improve the range of services available from mobile phones	Improve the quality of customer services
2021	55%	51%	29%	25%
2019	75%	53%	34%	36%
2018	62%	53%	55%	55%



Base : All

Internet Services

Bahrain Telecommunications Survey 2022
(Residential)

Internet Service Usage Summary



100%

ACCESS

Of respondents have access to home internet, including, Home Broadband and Mobile Data



100%

USAGE

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



47%

E-COMMERCE

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



7%

SWITCHING PROVIDERS

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



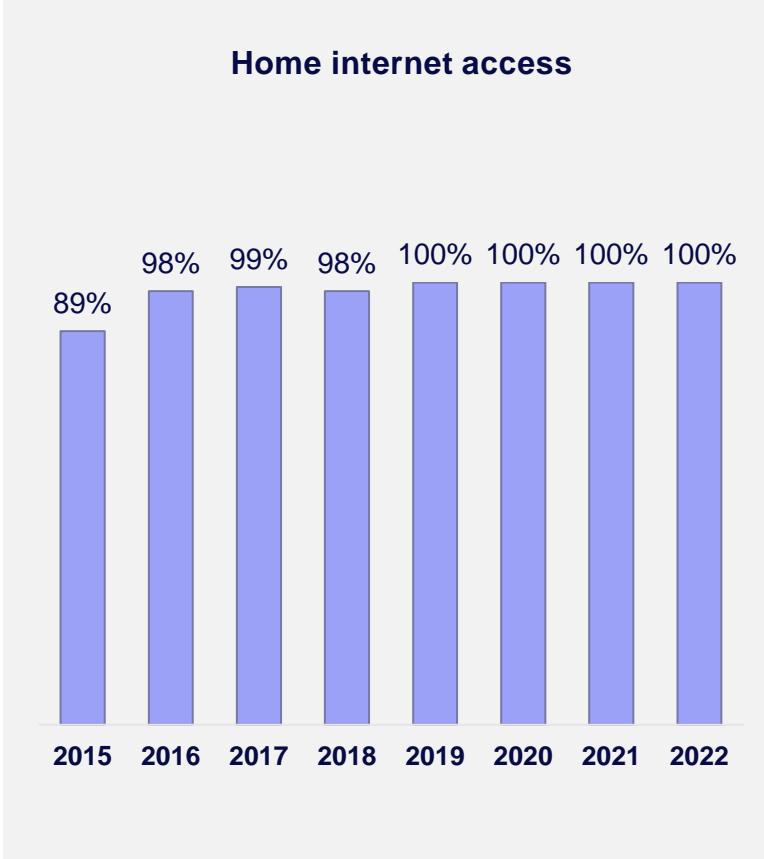
87%

SATISFACTION

Of respondents are satisfied with service provided and high satisfaction in reliability, speed and consistency.

Internet Usage

Respondents can access Internet from anywhere in Bahrain with almost all of them using internet daily.



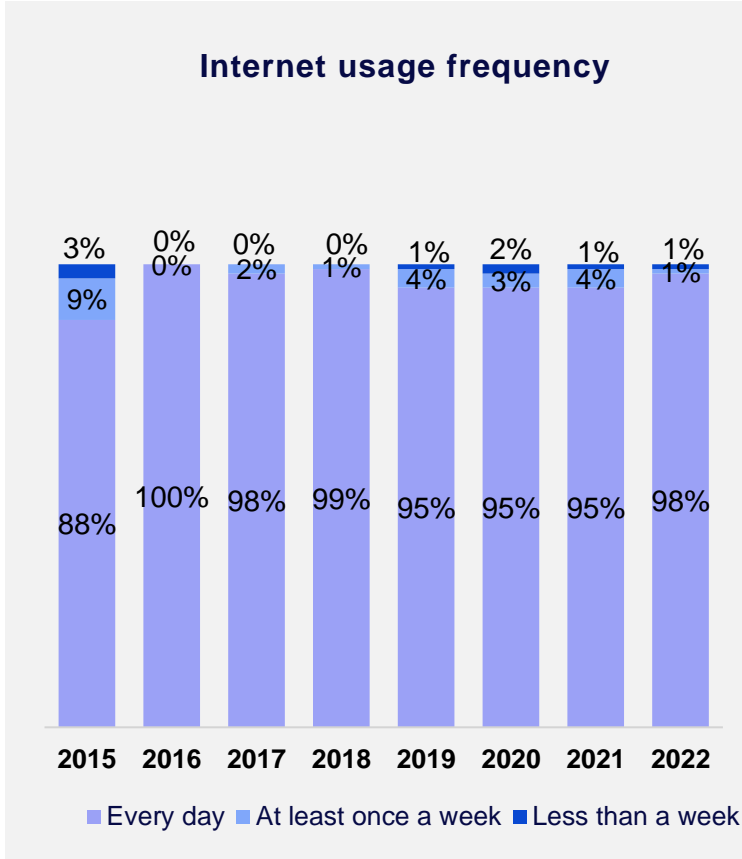
Q. Do you have access to internet at home?

Base: All



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

Base: All



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

Base: All Internet users
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Internet Usage Analysis: Active locations

While most respondents use internet service from their homes, internet usage across locations, especially work has returned to pre Covid levels in 2022.

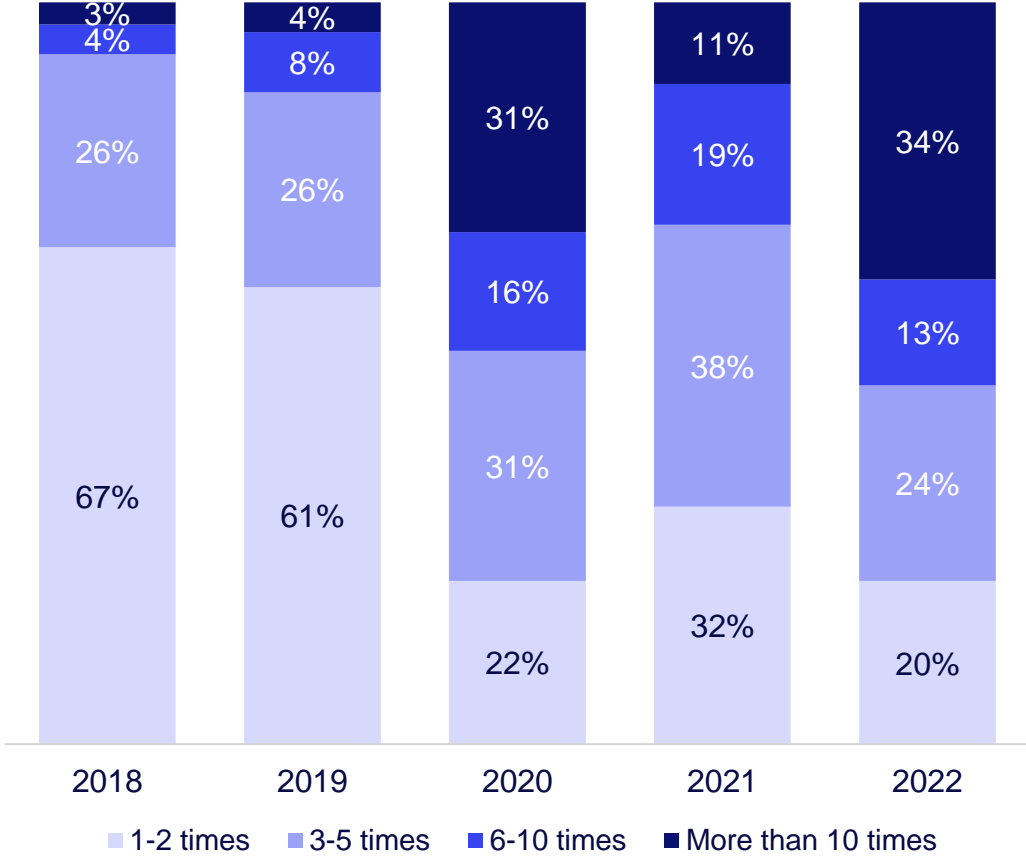
Figures in %	2015	2016	2017	2018	2019	2020	2021	2022
Home	84%	76%	98%	87%	94%	98%	94%	92%
Work	62%	58%	73%	66%	70%	48%	58%	71%
Community internet access facility	20%	14%	42%	46%	23%	20%	33%	35%
Another person's home	38%	20%	37%	25%	33%	26%	32%	49%
Mobile	-	-	-	-	-	29%	20%	49%
Commercial internet access facility	26%	16%	24%	35%	9%	15%	17%	23%
Place of education	14%	10%	10%	34%	16%	13%	7%	18%

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

Base: All Internet users

Online Purchase Frequency : Last One Year

Demand for online purchase continues to grow in the post Covid19 market.



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

Base: All who purchased online

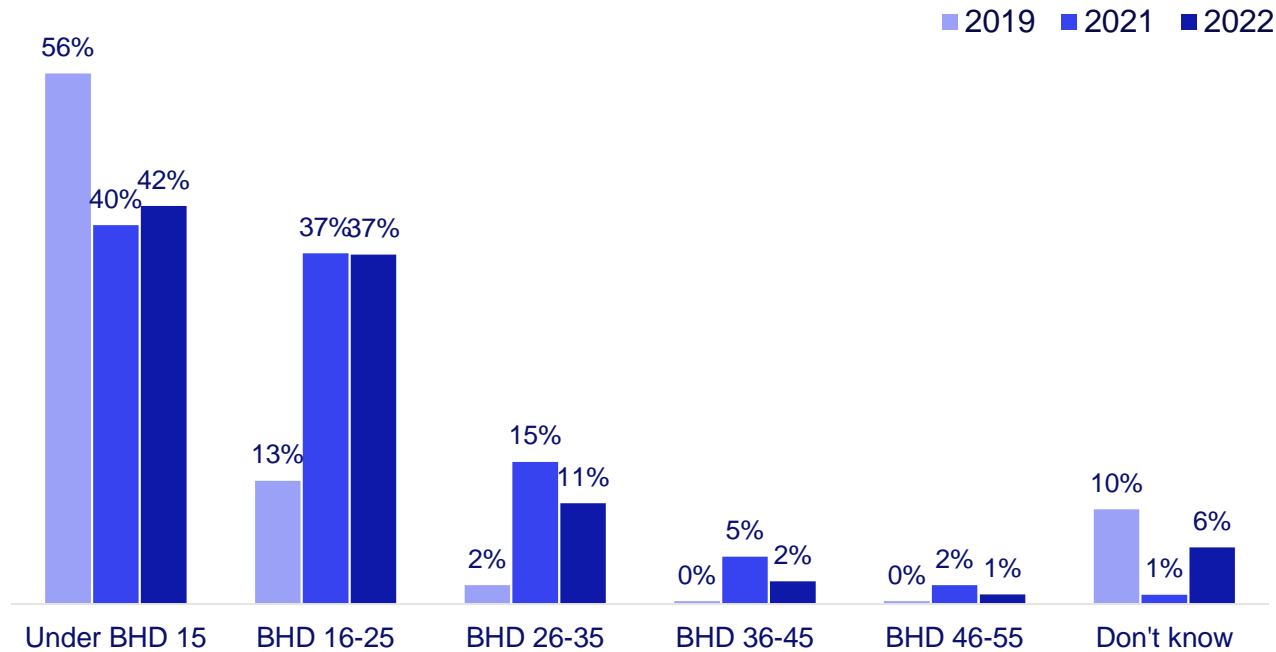
**No Response mentions not shown. Will not add to 100%

Online purchase, Average monthly spend on Internet

While, necessities (food & groceries) remain high, however, online purchase of clothing has picked up a lot. Average spending on internet remains steady over last year.

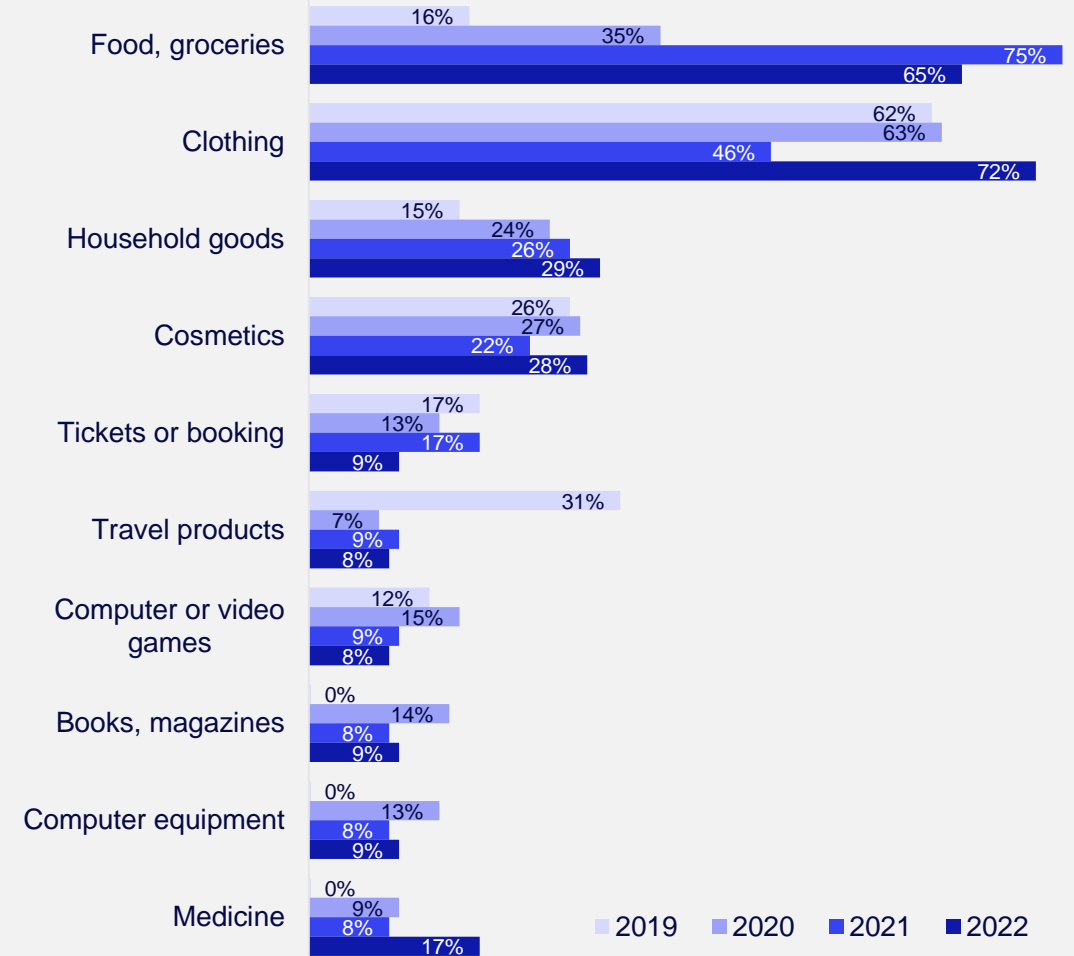
Average monthly expenditure (BHD)

2019	2021	2022
17	20	19



Base: All who purchased online

Online Purchase : Type of purchase



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

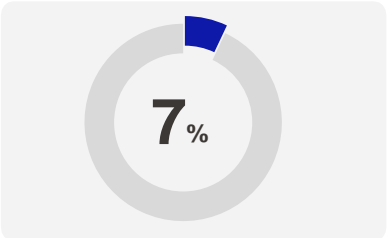
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Base: All Internet Users at home

Factors to switch internet service providers

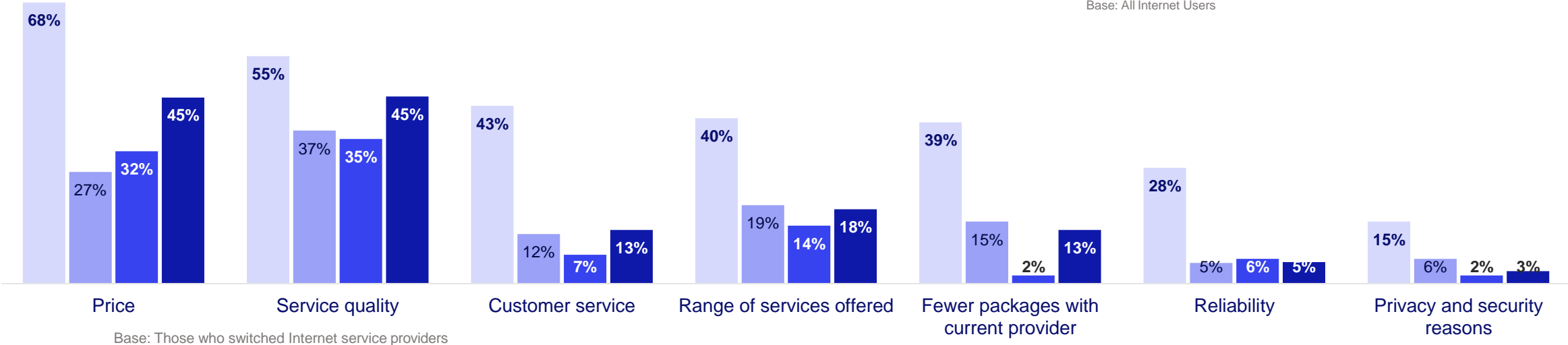
Reasons for switching internet provider remain largely price and service quality.

Switching internet provider



Switched Internet provider in last 12 months

■ 2019 ■ 2020 ■ 2021 ■ 2022

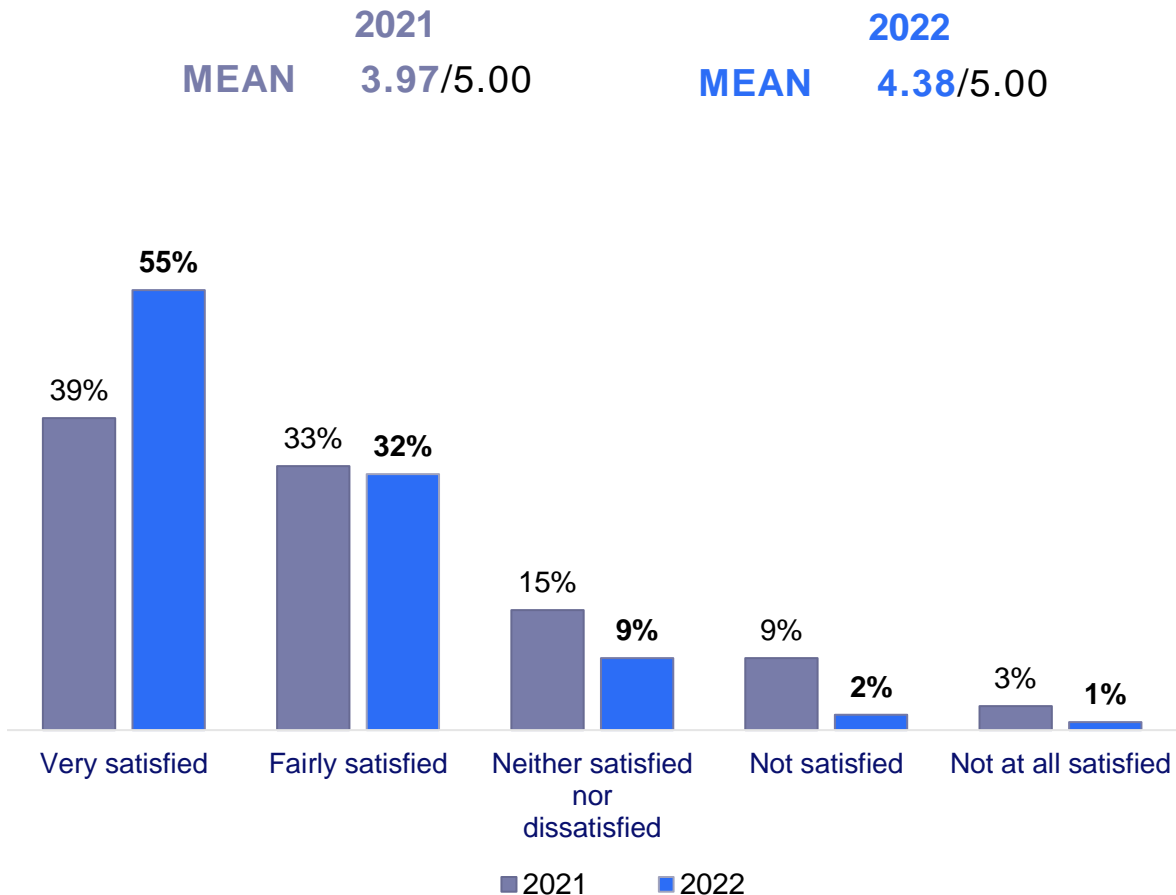


Base: All Internet Users

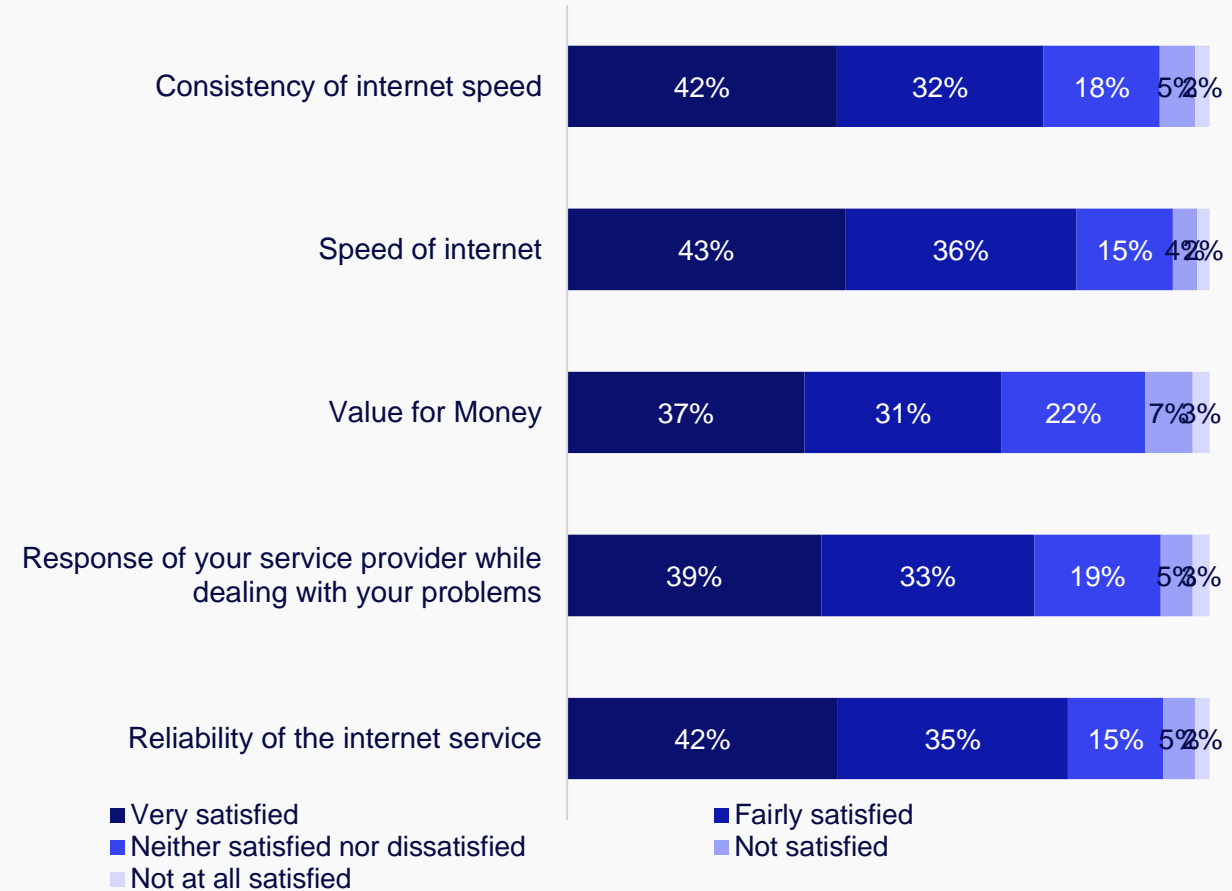
Overall satisfaction : Internet Services

Overall internet satisfaction improves further from previous year, with consistency & speed of internet gathering highest satisfaction.

Overall Satisfaction

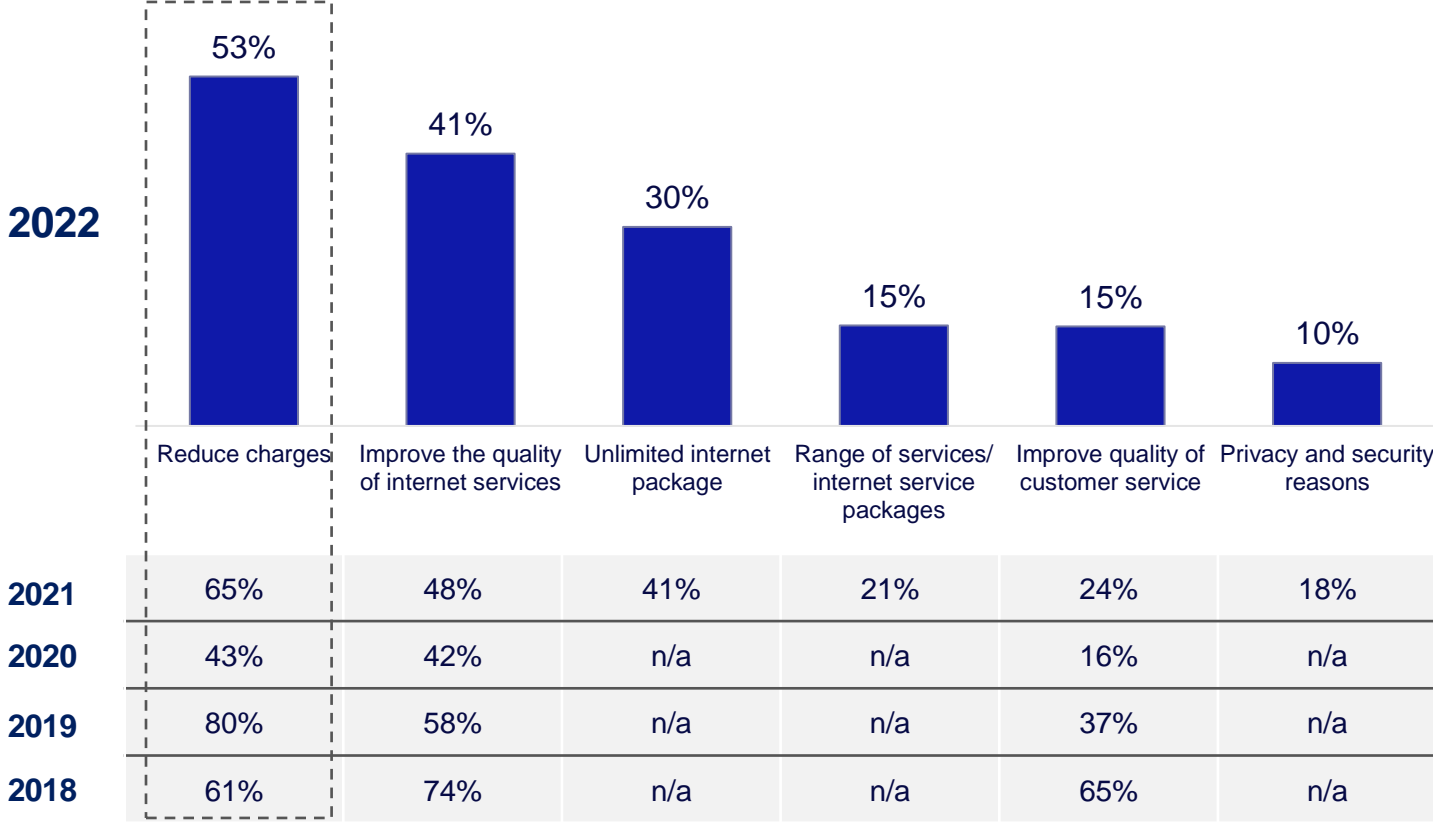


Satisfaction by Service Attributes



Suggestions to improve Internet services

Reduced charges remains the key area of improvement along with better Internet service quality



Base: All Internet users

OTT Applications

Bahrain Telecommunications Survey 2022
(Residential)

OTT Applications



100%

Access to OTT

All of respondents use OTT application to communicate



98%

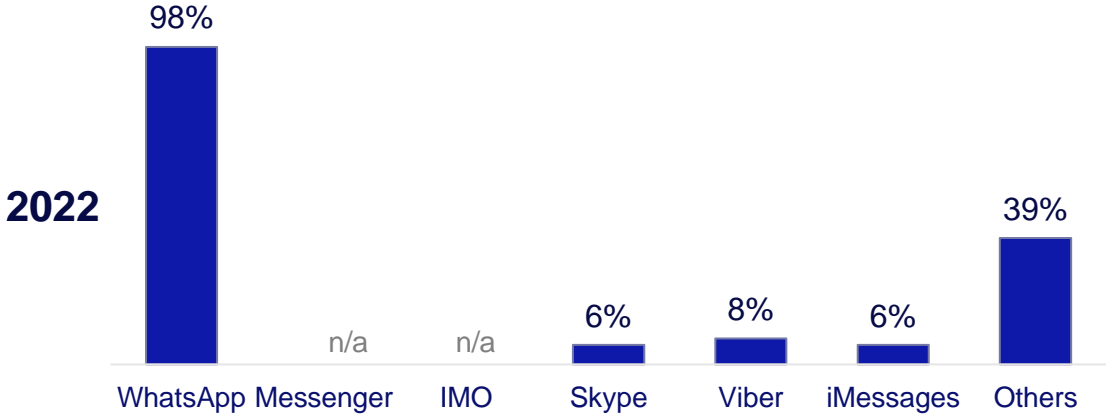
Usage

Of respondents use WhatsApp the most out of all OTT applications

OTT Apps : Usage & Comparison

- WhatsApp remains the lead OTT app with small presence of skype, Viber, iMessages along with other popular apps like IMO, Facebook, BOTIM, Snapchat.

OTT apps used



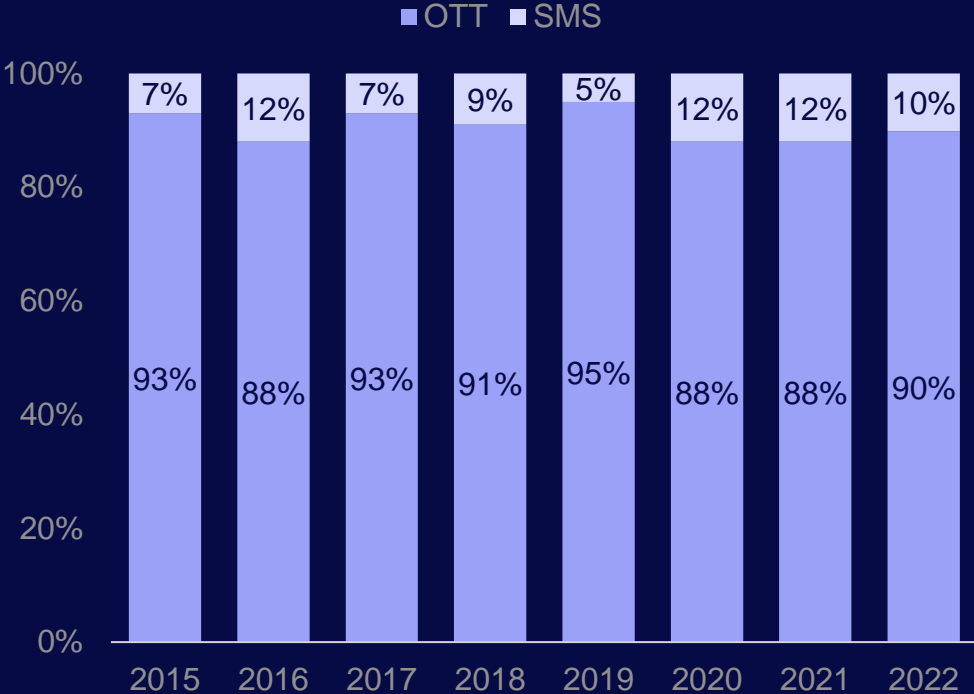
2021	98%	43%	32%	17%	8%	5%	n/a
2020	97%	n/a	n/a	5%	3%	7%	n/a
2019	100%	59%	36%	18%	15%	6%	n/a
2018	96%	n/a	n/a	34%	29%	22%	n/a
2017	99%	n/a	n/a	42%	39%	16%	n/a
2016	98%	n/a	n/a	43%	34%	28%	n/a

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

Base: All

- SMS usage is stable over last couple of years

Proportion of messaging – OTT vs SMS

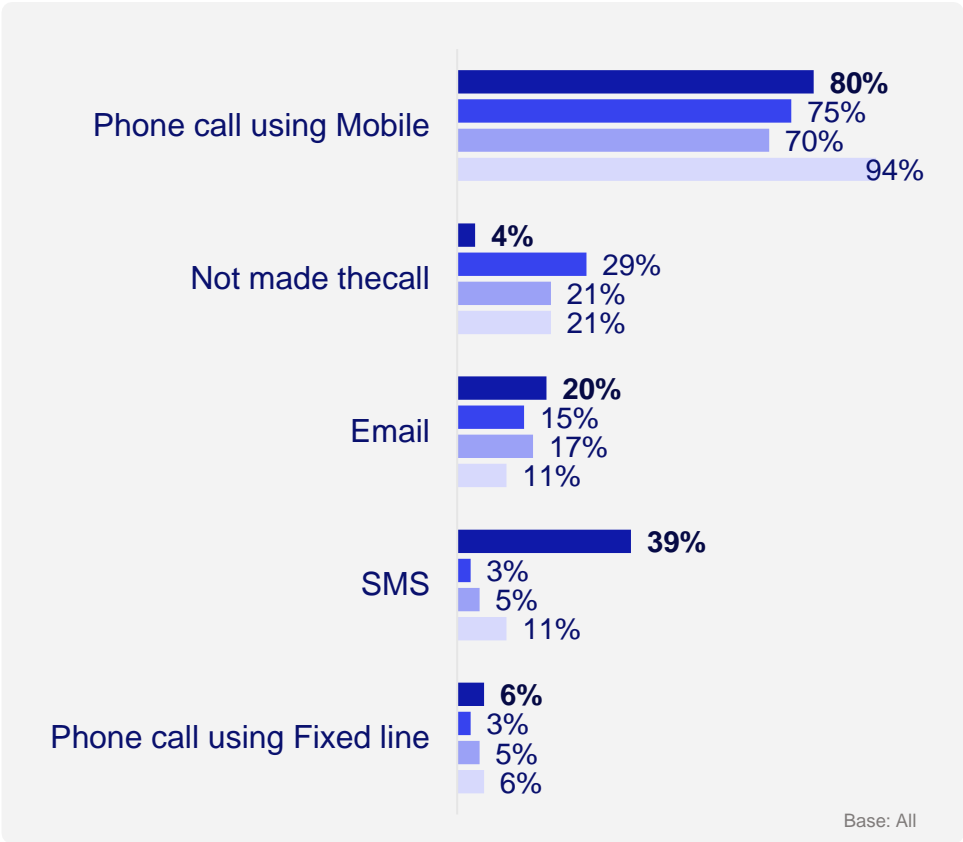


Base: All who use OTT

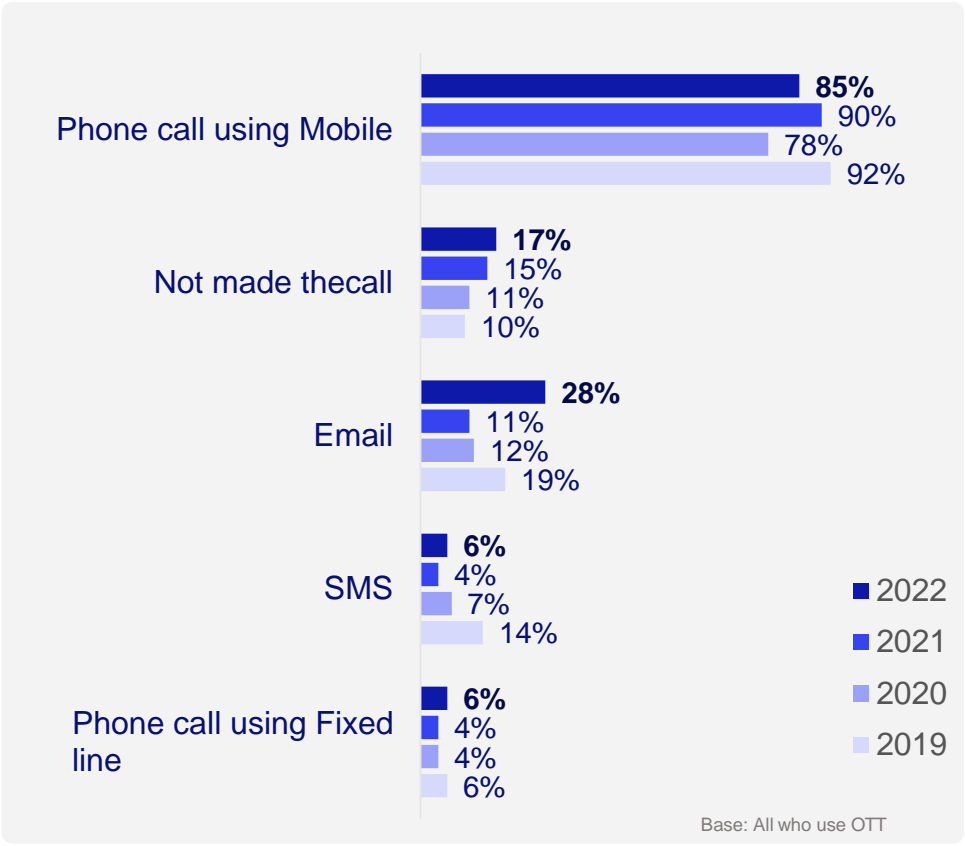
Unavailability of instant messaging & OTT apps

Calls using mobile continues to be the preferred alternative in case of unavailability of OTT services – use of SMS also picked up.

What if instant messaging apps are not available?



What if OTT Call are not available?



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?

International Calling

Bahrain Telecommunications Survey 2022
(Residential)

International calling



Top destinations

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



87%

Of respondents use OTT apps to make international calls



18 %

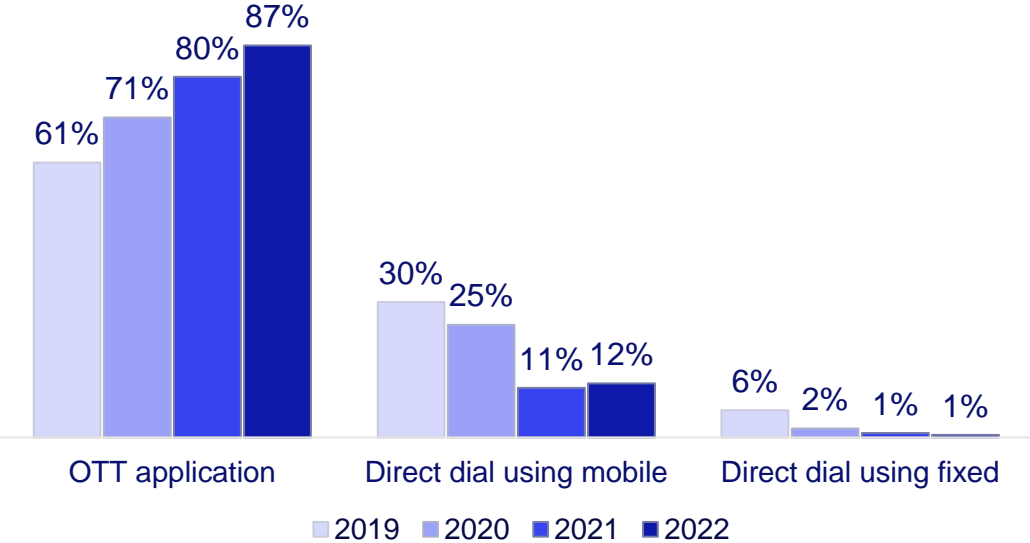
Of respondents use their local mobile service provider while travelling

International calling : Methods & Locations

OTT apps is the preferred way of making international calls International calls are mainly with either Asian or other GCC countries

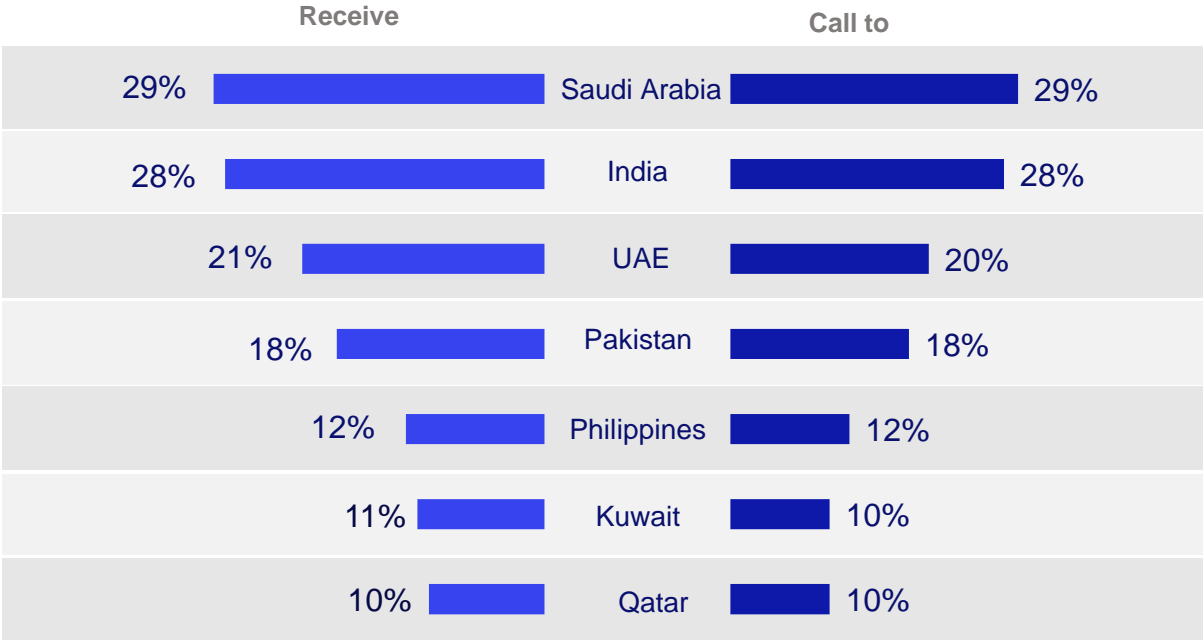
Methods used to make international calls

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

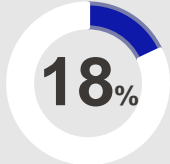
Countries to / from which international calls are made



Roaming services

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

Roaming Service

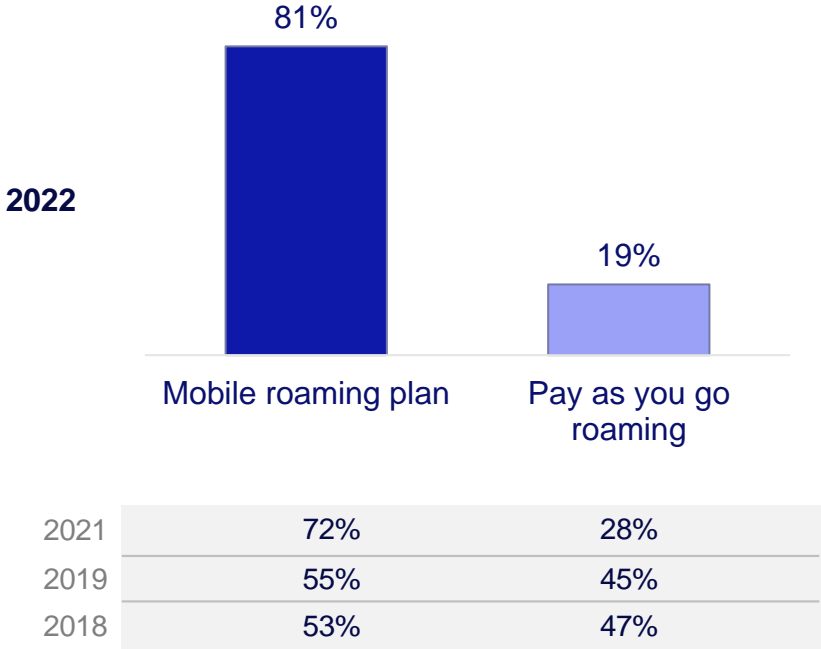


Used Roaming services via their Bahrain SIM card

Base: All



Types of mobile roaming service used in last 12 months



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

Fixed Line Services

Bahrain Telecommunications Survey 2022
(Residential)

Fixed-line Service Usage Summary



13%

OWNERSHIP

All respondents who own a fixed line connection



39%

USAGE

Respondents who use fixed line services out of all who own an active fixed line connection

“Have a mobile phone, so I don't need a fixed line”

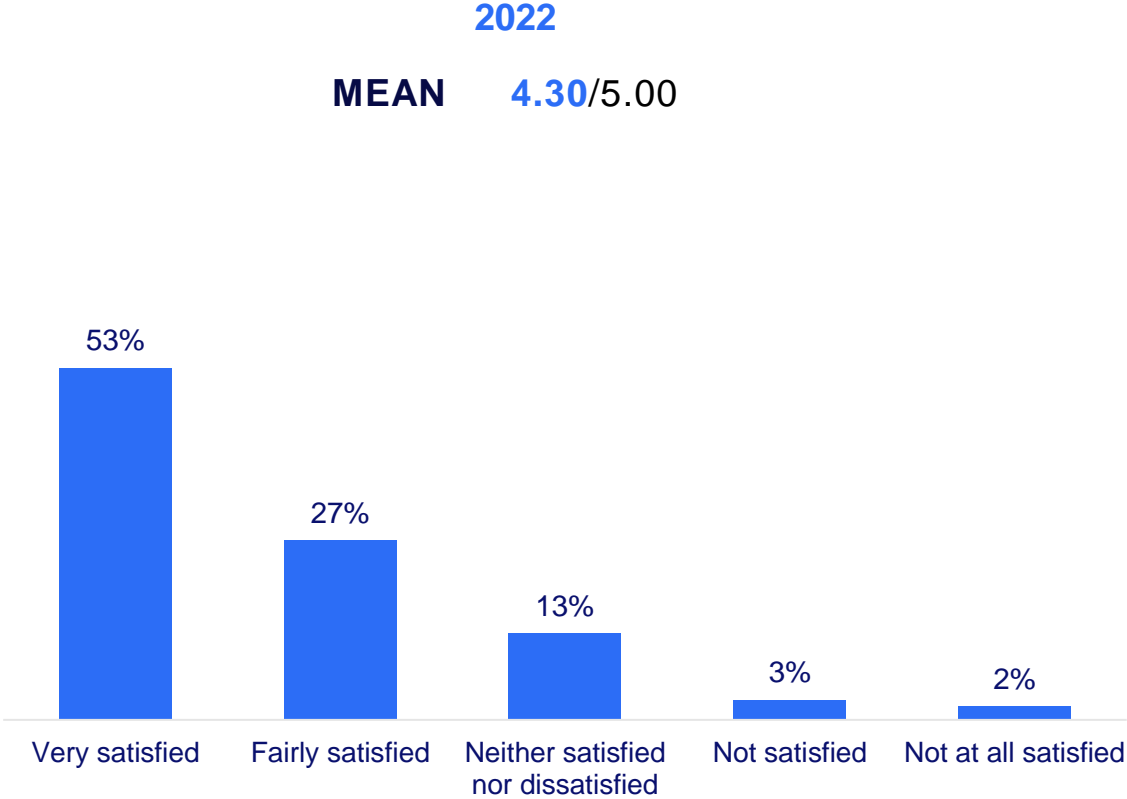
97%

Users mention this as main reason for not having a fixed line connection at home.

Overall Satisfaction : Fixed Line Services

Overall, 80% of respondents are satisfied with overall fixed line services.

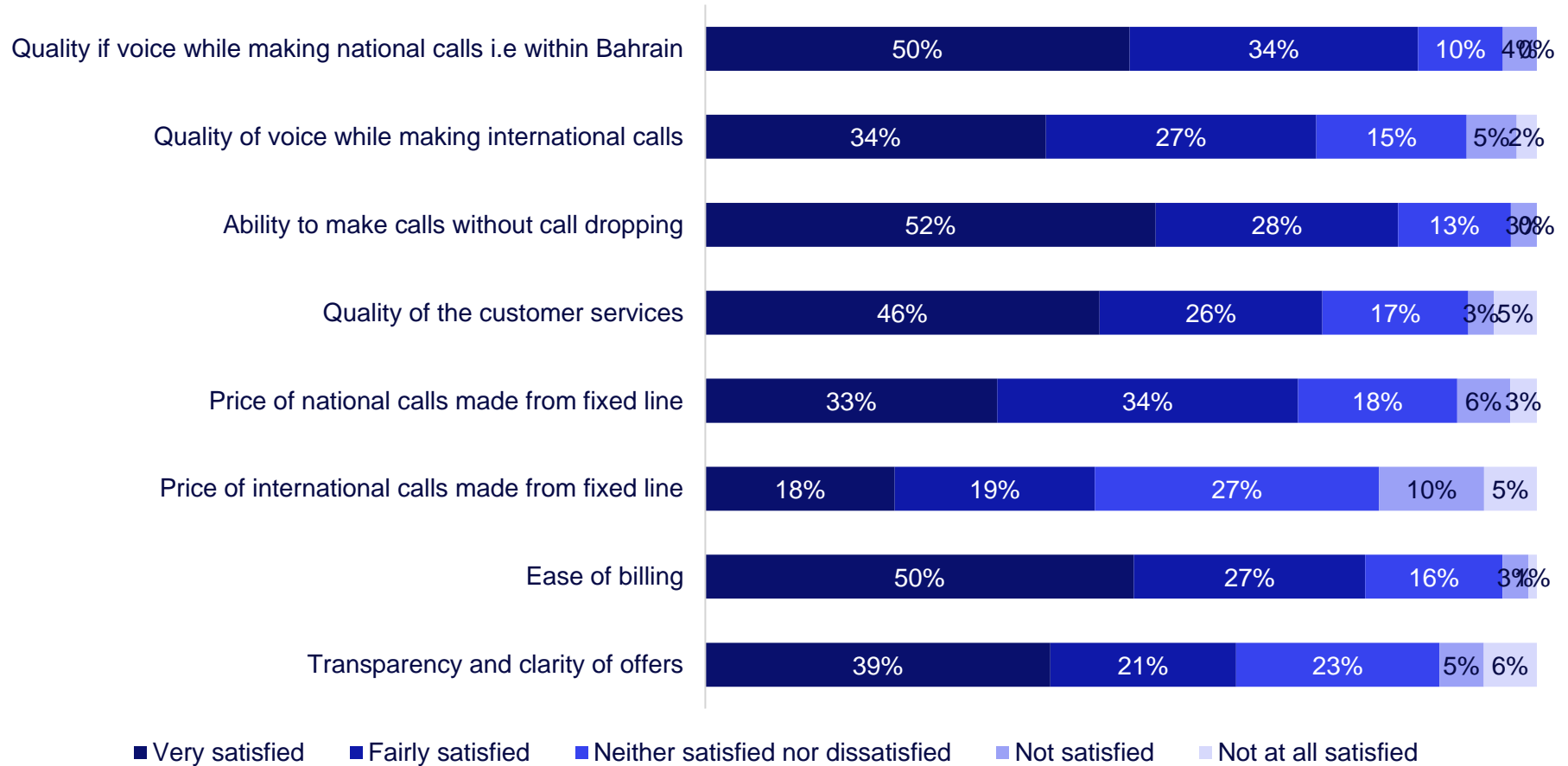
Q. How satisfied are you with the following elements of your fixed phone services?



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

Overall Satisfaction : Fixed line Service Attributes

Highest satisfaction observed for billing and network quality.



Q. How satisfied are you with the following elements of your fixed phone services?
 Base: All respondents who own fixed line

THANK YOU

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