



Q2 2019

Quarterly Market Indicators

Content

Disclaimer	Page 3
Mobile services	Page 4
Fixed line telephony services	Page 6
Broadband services	Page 8
Definitions	Page 10

Disclaimer

- TRA has relied on information supplied to it by third parties. It has not independently verified that data and as such does not make any representations or warranties, either express or implied, that:
 - the information is free from inaccuracies, errors or omissions;
 - the information is exhaustive;
 - the information is of merchantable quality and fitness for a particular purpose.
- TRA, including its officers, board members, employees, agents and contractors, is not liable for:
 - any inaccuracy, error or omission in the information contained in this document; nor
 - any loss, damage, cost or expense whether direct, indirect, consequential or special, incurred by, or arising by reason of, any person using or relying on the information and whether caused by reason of any inaccuracy, error, omission or misrepresentation in the information or otherwise.

Market Indicators Snapshot for Q2 2019

Mobile subscribers:
2,086,839
Penetration:
139%

Average Usage:
232 minutes



Mobile Prepaid subscribers:
1,435,790

% of Prepaid of Mobile Market:
68.8%



Mobile Postpaid subscribers:
651,049

% of Postpaid of Mobile Market:
31.2%



Fixedline subscribers:
226,004
Penetration:
15%

Average Domestic Minutes:
132 minutes



Fixed Wired Subscribers:
86%
Fixed Wireless subscribers:
14%

Outgoing Mobile Inter. Minutes:
399,832,607
Outgoing Fixed Inter. Minutes:
1,299,749



2.33 Million
broadband subscribers

156%
Broadband Penetration Rate



167 Petabyte
Total Data Traffic

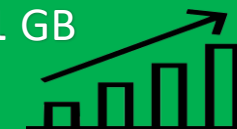
Avg. Traffic Per
subscription:
24 GB

95 Petabyte
Fixed Broadband Traffic

Avg. Fixed Traffic:
161 GB

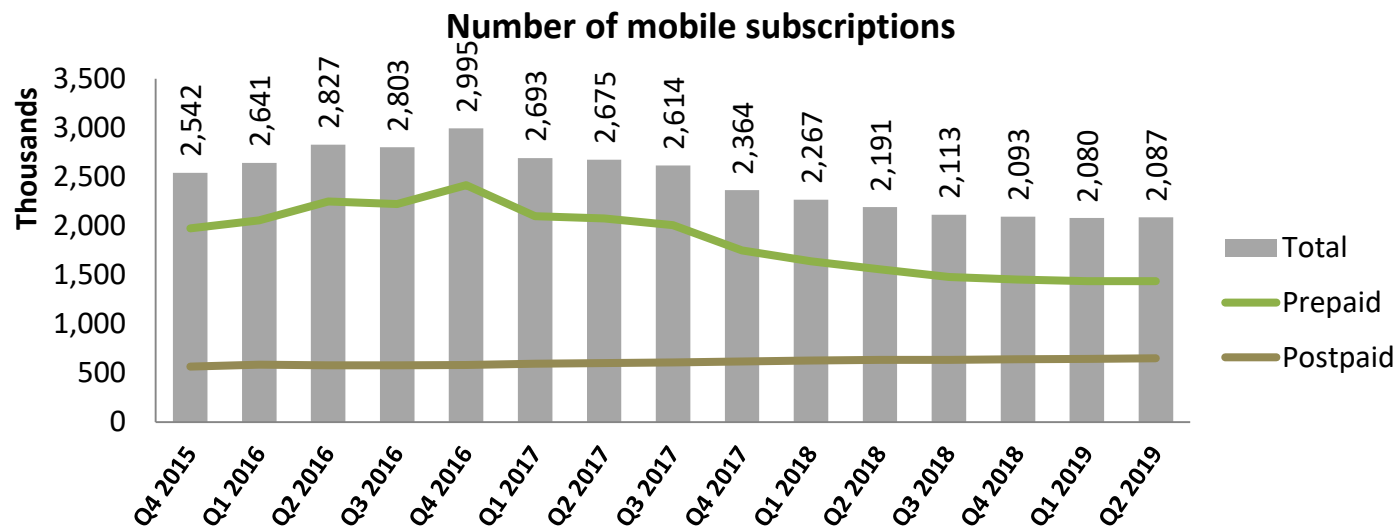
72 Petabyte
Mobile Broadband
Traffic

Avg. Mobile Traffic:
11 GB



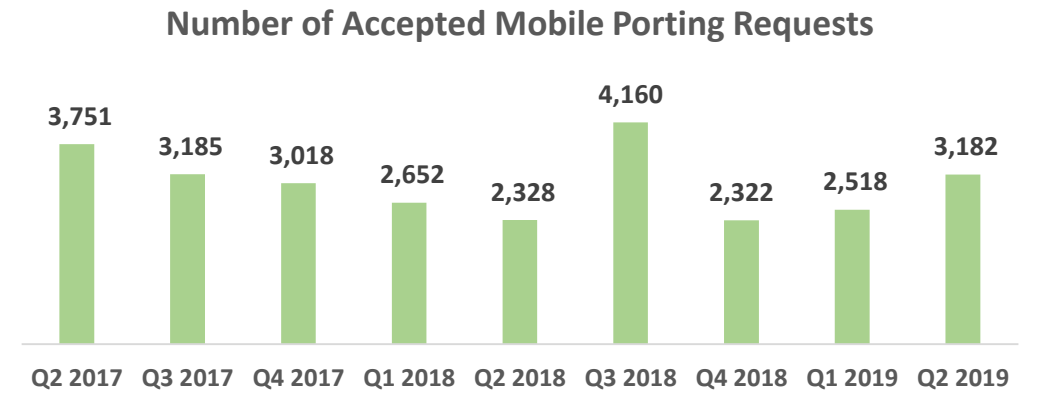
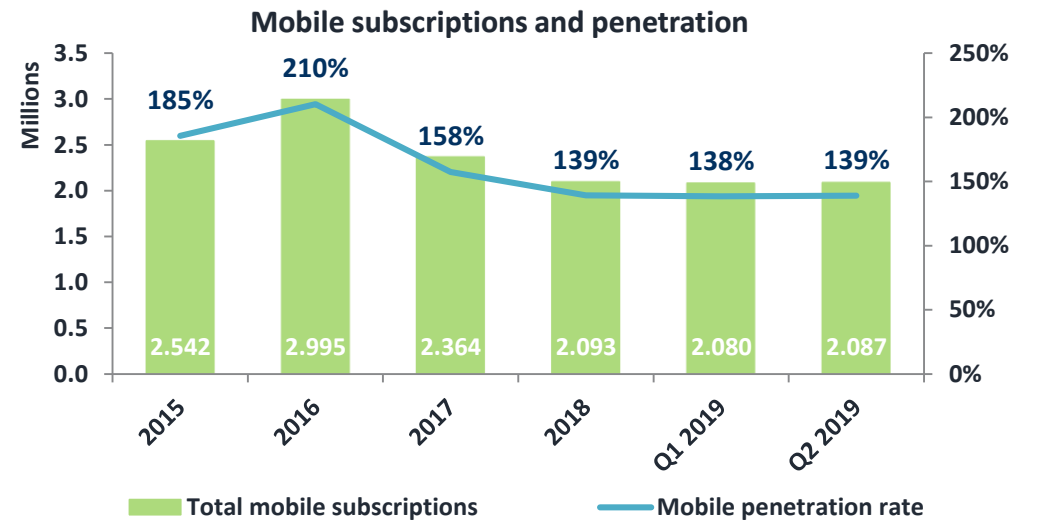
Mobile services: Subscriptions

- The growth trend in mobile postpaid subscriptions continuing as postpaid subscribers increased from 639,209 at the end of 2018 to 651,049 at the end of Q2 2019, a **1.9%** increase.
- On the other hand, mobile prepaid subscriptions is declining from **1,453,505** at the end of 2018 to **1,435,790** at the end of Q2 2019, a **1.2%** decline.
- Overall, Total subscriptions Increased slightly since the beginning of 2019 and penetration rates are stable over the period.
- Number of accepted ported mobile lines increased to 3,182 from 2,518 in Q1 2019.



Number of Mobile subscriptions (End of Q2 2019)
2,086,839 Subscribers
139% Penetration rate

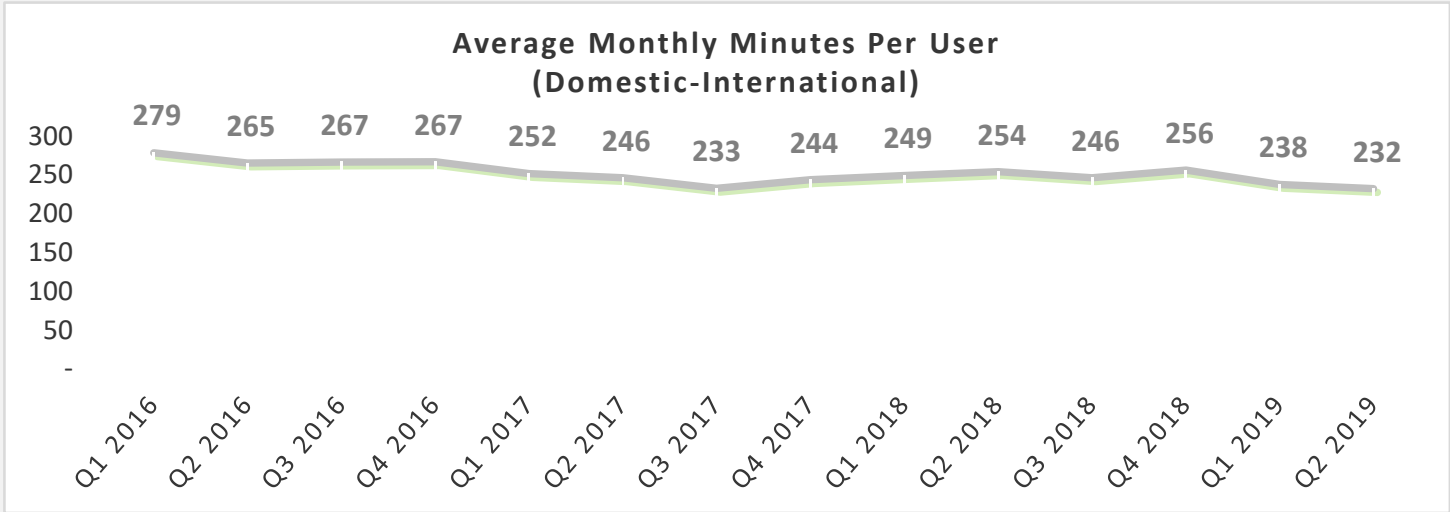
	2016	2017	2018	Q2 2019
Total	2,994,865	2,364,477	2,092,714	2,086,839
% of Prepaid	80.60%	73.94%	69.46%	68.80%
% of Postpaid	19.40%	26.06%	30.54%	31.20%



Population By IGA	2015	2016	2017	2018	Q2 2019
	1,370,322	1,423,726	1,501,116	1,503,091	1,503,091

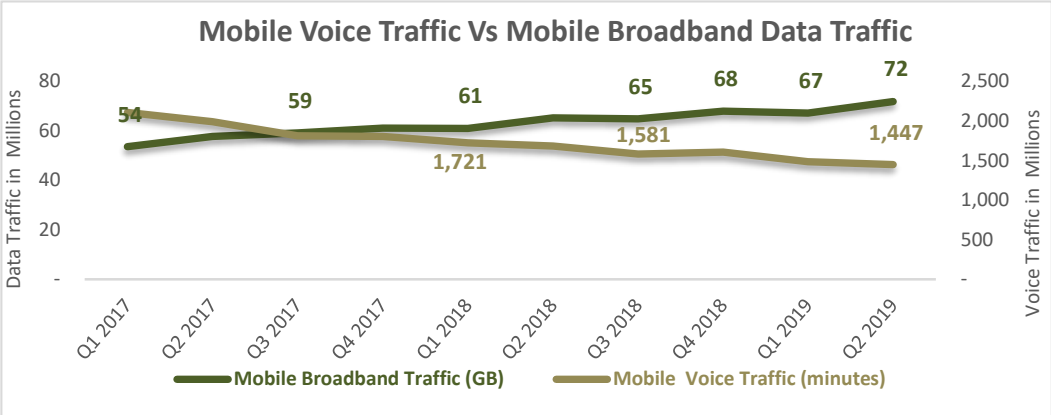
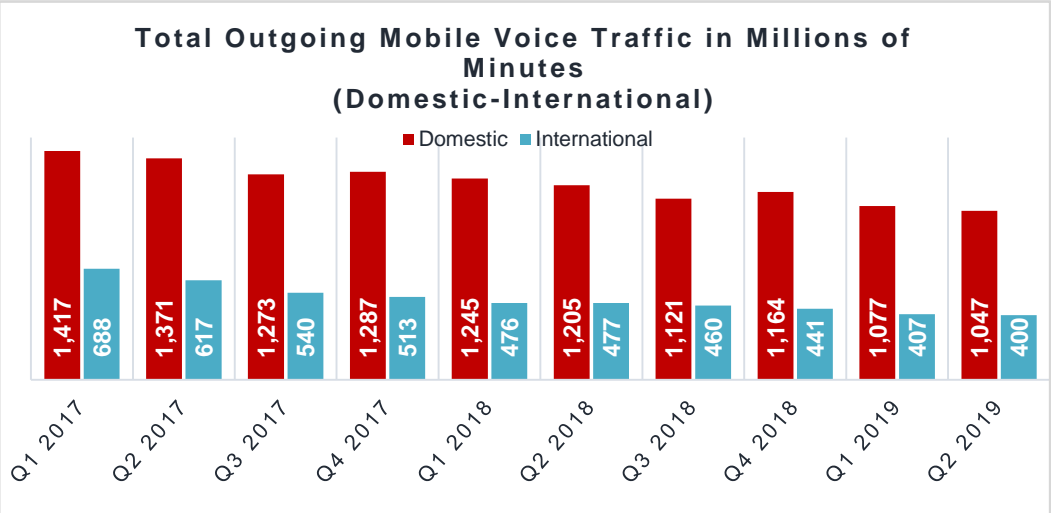
Mobile services: Traffic (Minutes)

- Between Q2 2018 & Q2 2019, total mobile outgoing minutes decreased by **13.98%**.
- Domestic mobile prepaid outgoing minutes declined by **20%** while domestic mobile postpaid minutes declined by **5%**. Overall, total domestic minutes declined by **13.14%**.
- For mobile international outgoing minutes, prepaid minutes declined by **16%** while postpaid minutes declined by **18.6%**. Overall, mobile International outgoing minutes declined by **16.1%**.
- Average monthly minutes per user decreased to **232** minutes. That number compromise of average domestic monthly minutes per subscribers of **168** and average international monthly minutes by subscriber of **64**.



Total Outgoing Traffic in Minutes (Domestic + International)*

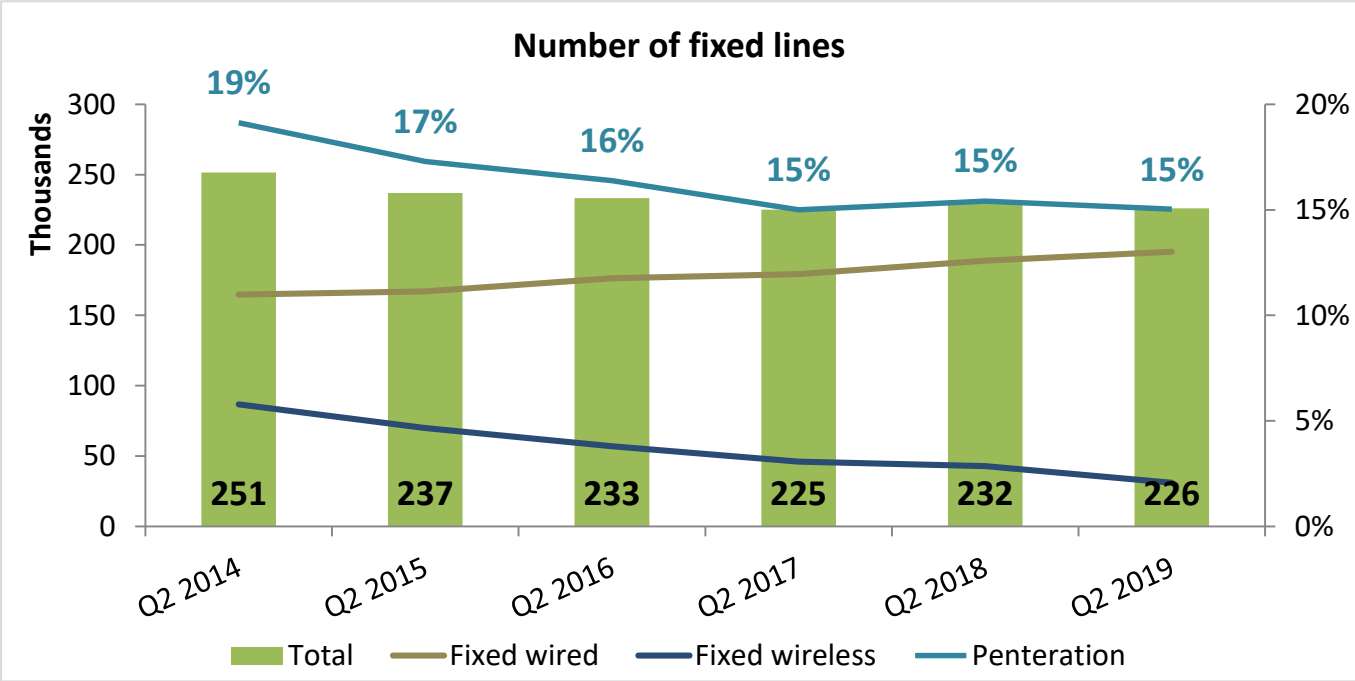
Q2 2018	Q2 2019	
1,682,005,555	1,446,830,624	13.98% ▼



* Revised for 2019 data

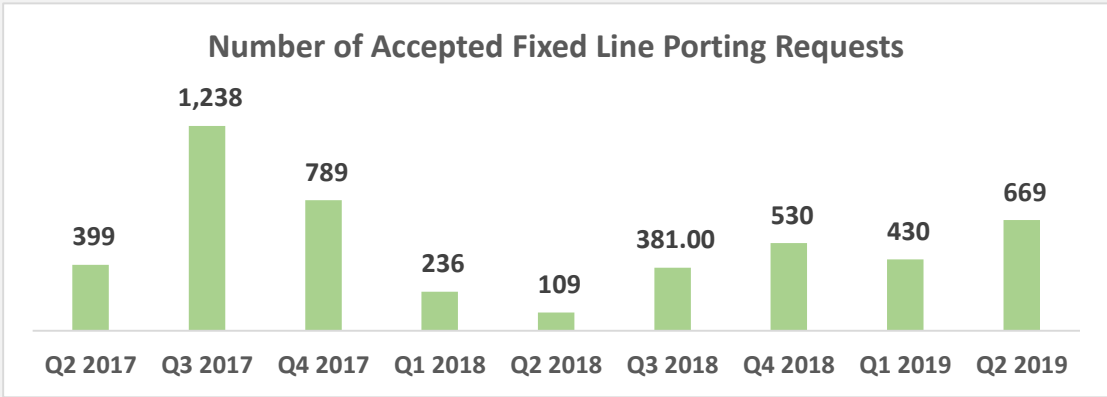
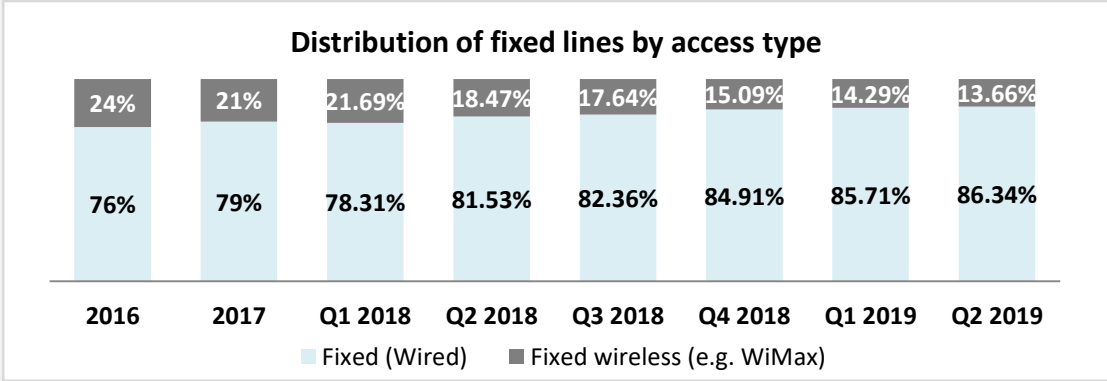
Fixed telephony services: Subscriptions (PSTN & Wireless)

- Since the beginning of 2019, fixed telephony subscription increased by **0.23%**. Fixed wired subscriptions increased by **1.92%** while fixed wireless subscriptions decreased by **9.26%**.
- Number of ported fixed lines reached to 669 lines.



No. of fixed telephony subscriptions

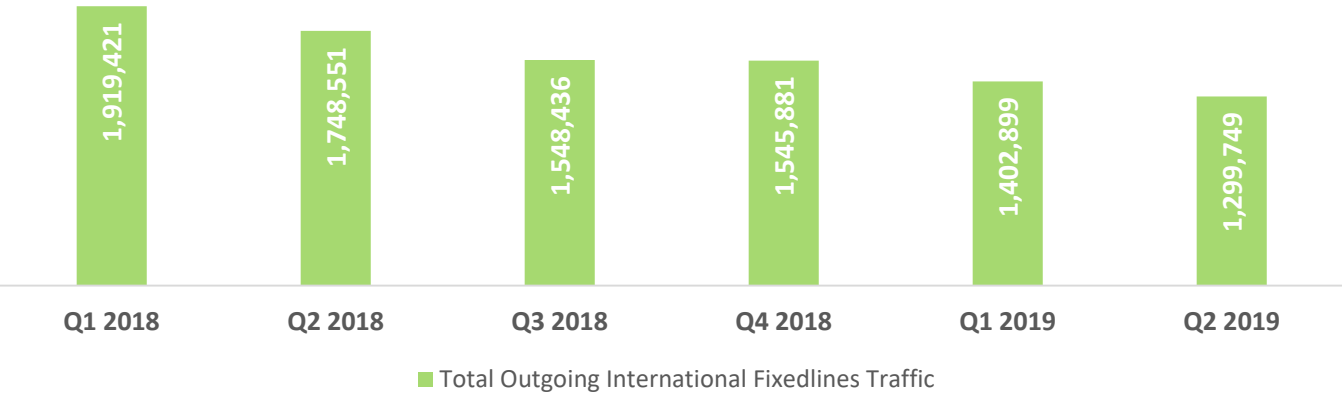
End of Q2 2018		End of Q2 2019		
231,734		226,004		
15% Penetration rate		15% Penetration rate		
	2016	2017	2018	Q2 2019
Total	233,917	234,709	225,479	226,004
% of Fixed Wired	76.26%	79.01%	84.91%	86.34%
% of Fixed Wireless	23.74%	20.99%	15.09%	13.66%



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

- Overall, fixed telephony domestic traffic is stable over the last 6 quarters.
- On the other hand, fixed telephony international traffic has decreased by **25.67%** over the period between Q2 2018 & Q2 2019.
- Average monthly outgoing domestic minutes per subscriber is stable at 132 while average monthly international minutes reached to 6 minutes per subscriber.

Total Outgoing International Fixedlines Traffic



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

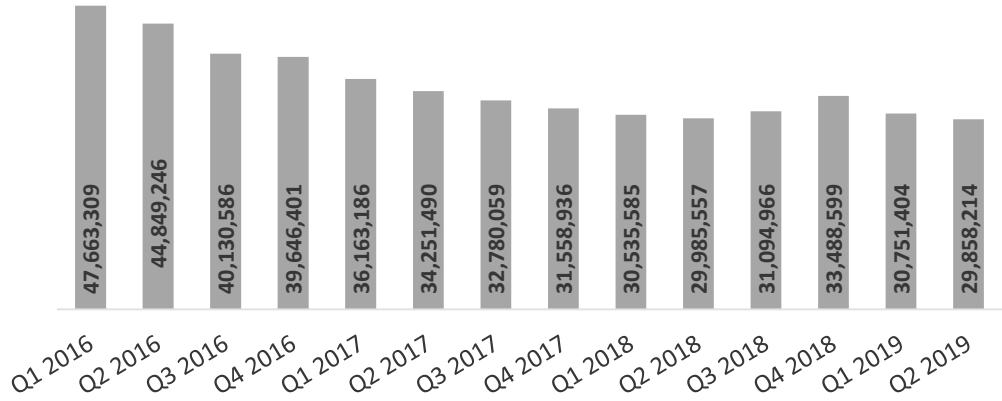
** Revised for 2019 data



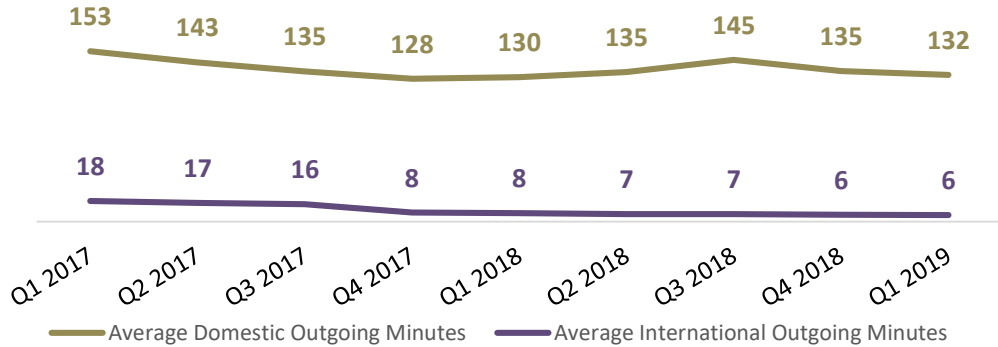
Total fixed domestic outgoing traffic in minutes**

Q2 2018	Q2 2019	
29,985,557	29,858,214	0.42%

Fixed Line Total Domestic Outgoing Traffic (Minutes)



Average Outgoing Domestic & International Minutes Per Subscription



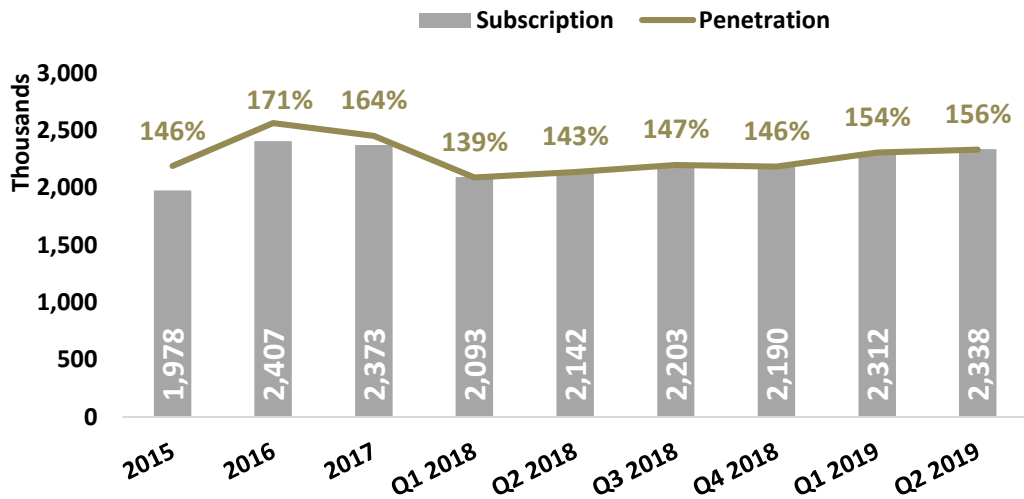
Broadband services: Subscriptions

- Broadband penetration reached **156%**, and between Q2 2018 & Q2 2019 broadband subscription increased by **9%**.
- Fixed wired broadband subscription increased by **14%** while fixed wireless increased by **3%**.
- Mobile broadband subscription overall increased by **9%**, at the same time, standalone broadband subscription increased by **16%**.

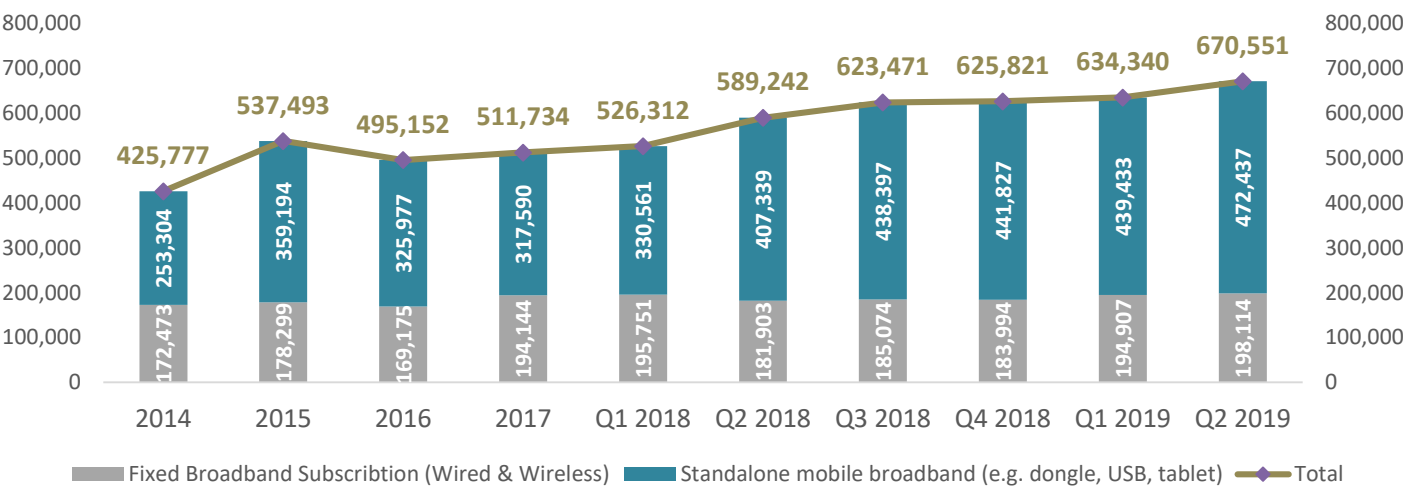


No. of broadband subscriptions (End of Q2 2019)*
2,337,786
156% Penetration rate

Broadband Subscriptions and Penetration



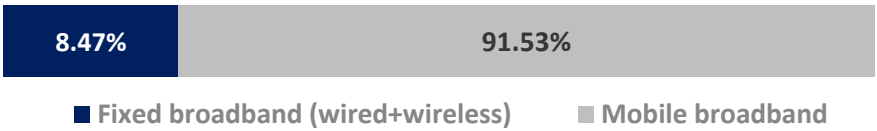
Broadband services subscriptions from a fixed location
(Dedicated Broadband)



Mobile Broadband – Q2 2019



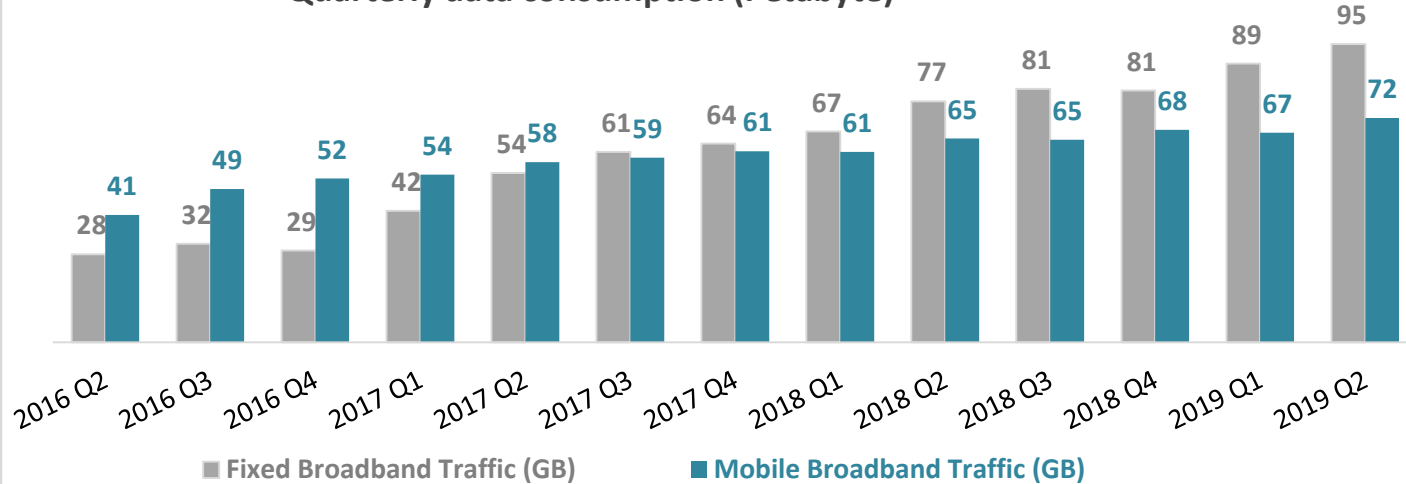
Proportion of broadband subscriptions by access type – Q2 2019



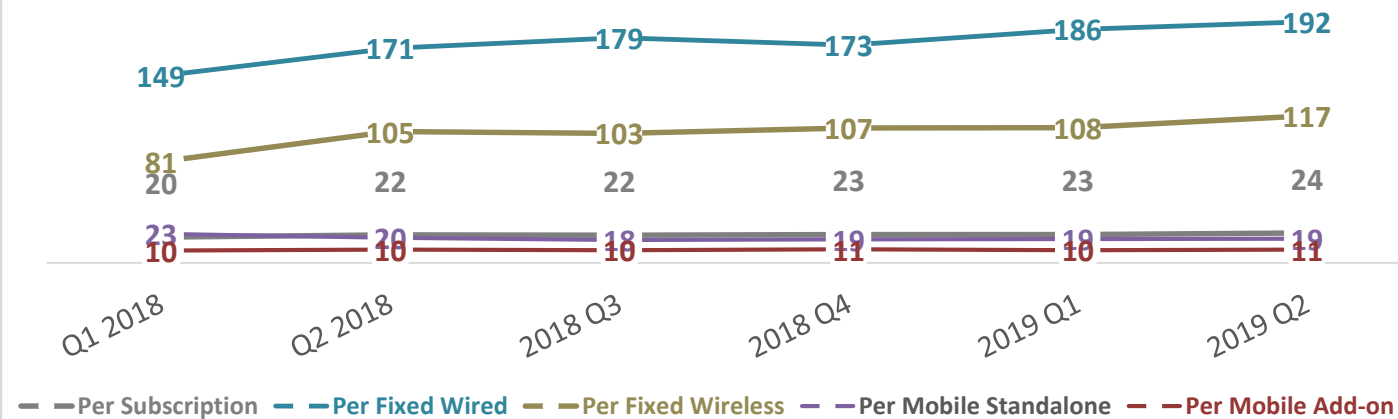
* Revised for 2019 data

Broadband services: Data Traffic*

Quarterly data consumption (Petabyte)



Monthly Average data consumption per subscription (Gigabyte)



Total data traffic in Gigabyte***

Q2 2018

142,375,442

Q2 2019

167,240,014

▲
17.46%

- At the end of Q2 2019, Data consumption reached a new height to **167** petabyte, an increase of **17.46%** over the same period last year.
- Fixed Broadband traffic increased by **23.7%** over the same period while mobile data consumption increased by **10.1%**.
- For Fixed broadband, fixed wired traffic reached to **66.3** Petabyte in Q2 2019 from **51.7** Petabyte in Q2 2018 a **28.1%** increase while fixed wireless traffic reached to **29.1** Petabyte from **25.3** Petabyte a **14.8%** increase for the same period.
- While for mobile broadband, standalone traffic reached to **27.2** Petabyte in Q2 2019 from **24.4** Petabyte at Q2 2018 an **11.3%** increase, and for Add-on mobile broadband traffic reached to **44.5** Petabyte from **41.3** Petabyte a **7.8%** for the same period.

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. 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