

An aerial night view of a city skyline, featuring prominent skyscrapers like the Kingdom Tower on the left and the Bahrain World Trade Center in the center. The city lights are visible across the horizon. A purple rectangular overlay covers the left side of the image, and a pink rectangular overlay is positioned to its right.

# Customer Satisfaction Research - stc Bahrain

October 2022





**Study specifics**

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**Mobile Voice**

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**Home Broadband**

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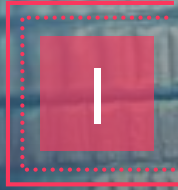


**Mobile Broadband**

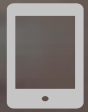
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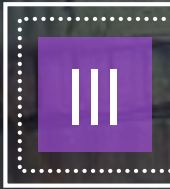
**Touchpoints Evaluation**



**Study specifics**



**Mobile Voice**



**Home Broadband**



**Mobile Broadband**



**Touchpoints Evaluation**

01

Sample & Methodology

02

Demographics of Sample

# Study Specifics





# Sample & Methodology



## Sample Size

1971 Respondents

**Mobile Voice 1,000**

(stc 600, Zain 200, Batelco 200)

**Home Broadband 400**

(stc 200, Zain 100, Batelco 100)

**Mobile Broadband 400**

(stc 200, Zain 100, Batelco 100)



## Age

18+ years



## Gender

Men & Women



## Area of Residence

Residents of Bahrain



## Methodology

Telephonic Interviews -  
CATI



## Nationality

Bahrainis, Arab  
Expats & Other  
Expats



## Questionnaire

Questionnaire duration ~25  
minutes



## Fieldwork Duration

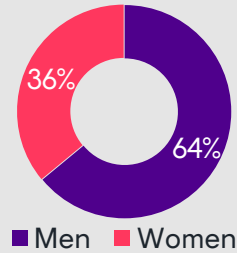
July - September 2022

**Study conducted by ipsos**

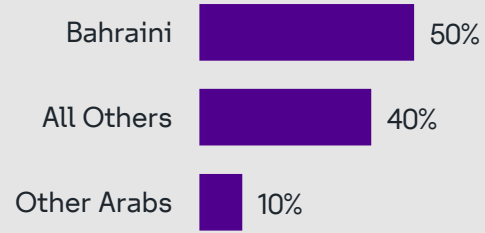
# stc Demographics of Sample

Confidential

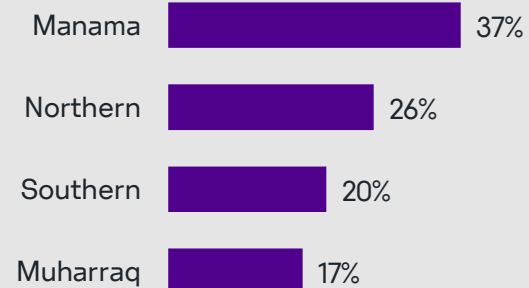
## Gender



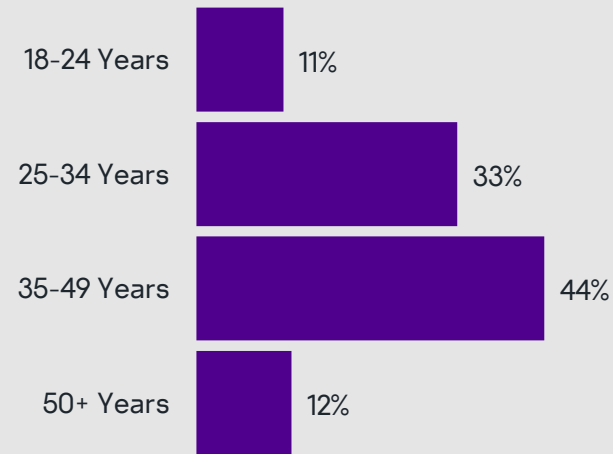
## Nationality



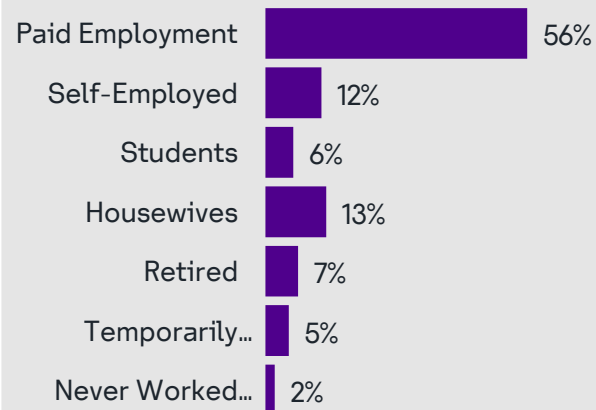
## Area of Residence



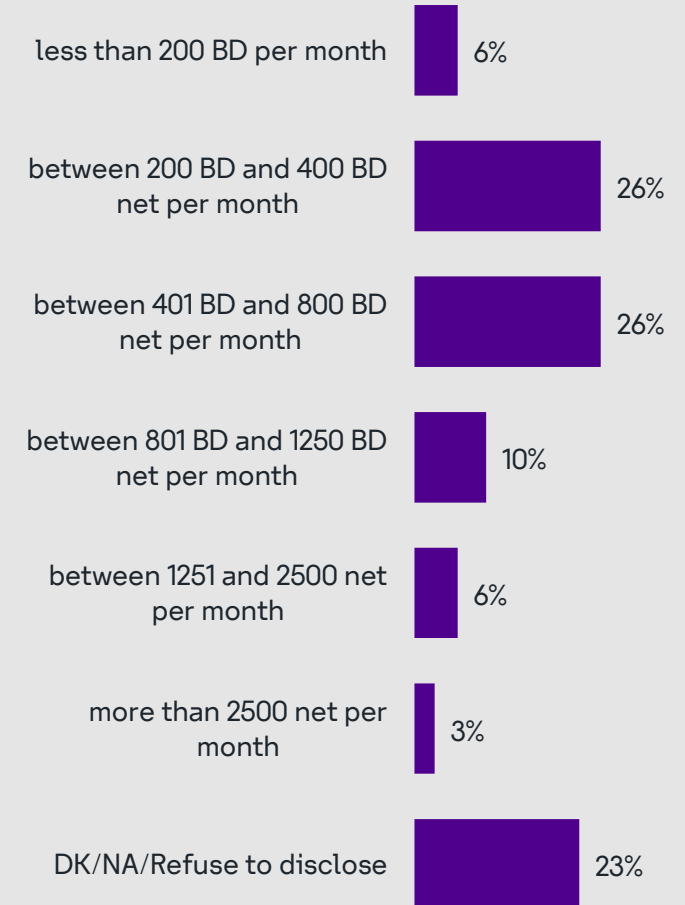
## Age



## Occupation



## Household Income/BD

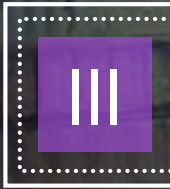




## Study specifics



## Mobile Voice



## Home Broadband



## Mobile Broadband



## Touchpoints Evaluation

01

Usage

02

Net Promoter Score (NPS)

03

Overall Satisfaction

04

Satisfaction Deep Dive

05

Summary & Way Forward

# Usage

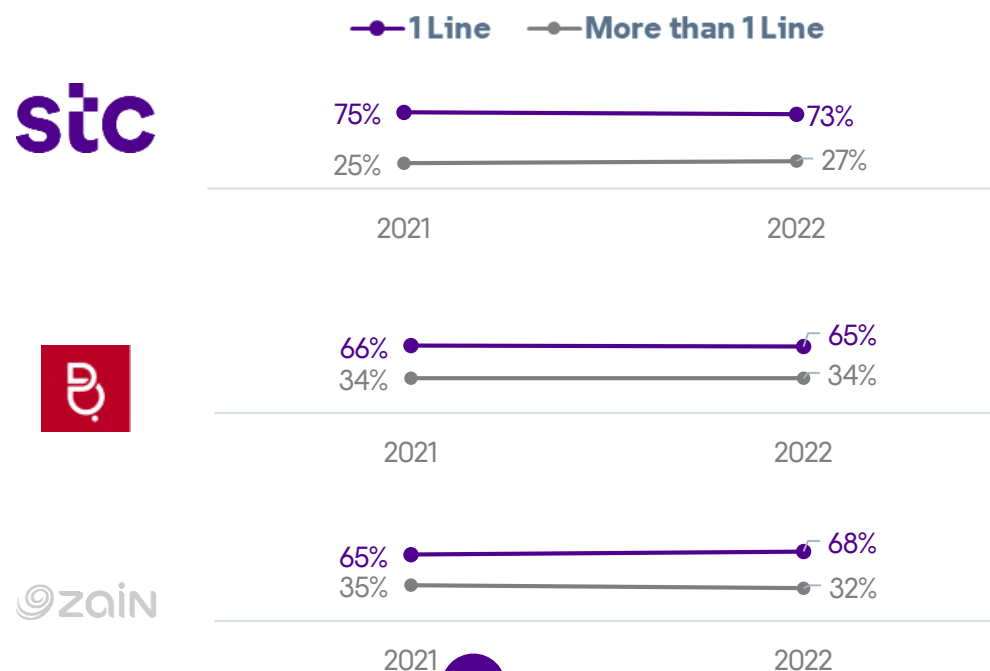




Over 7 in 10 of stc users own one mobile line  
Most of mobile voice users also use data/mobile internet across all brands

## Number of Mobile Connections and Usage of Data /Mobile Internet

### Number of Lines Owned



- Over 1/4<sup>th</sup> of stc users own more than 1 line which is significantly lower than competition.

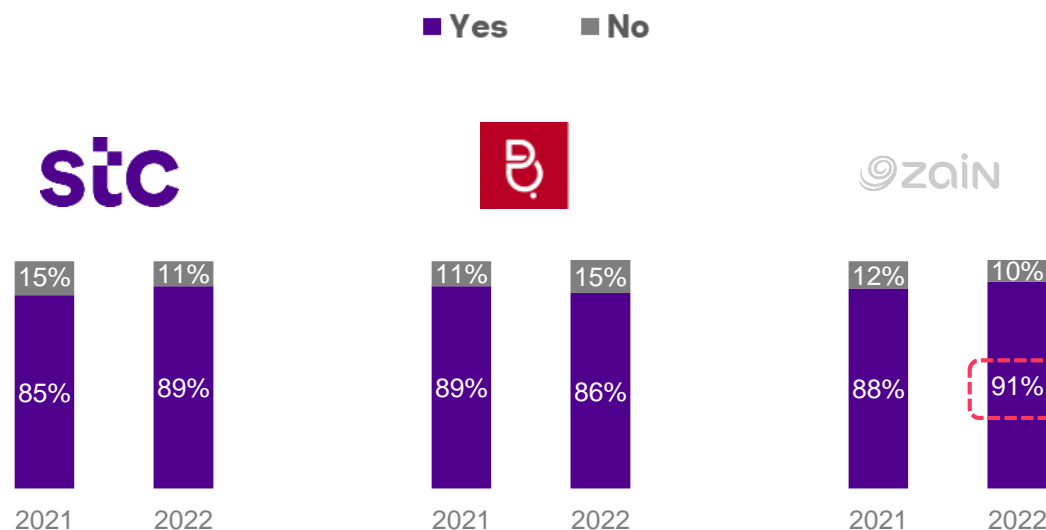
Base: 1016

A2. How many mobile connections are you currently using for voice calls?

A3. What is your main brand for voice call?

A3. A. Are you currently using data/ mobile internet on your main voice sim/connection?

### Usage of Data on Voice SIM



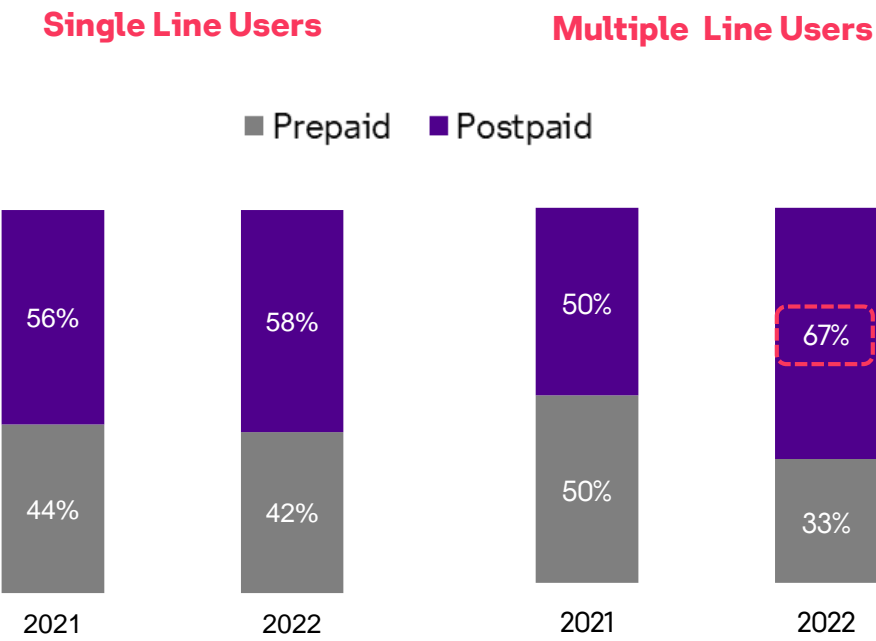
- Zain has the highest segment of users who use data on voice SIM, followed by stc

# Incidence of postpaid connection is higher among Multi SIM users

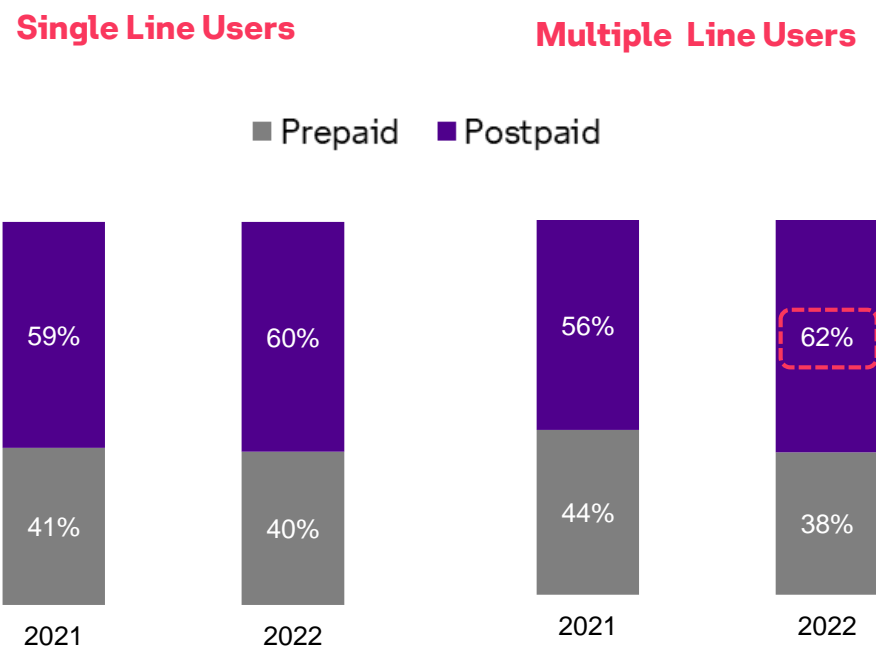
(Even true amongst stc users)

## Mobile Voice Subscription

Multi Sim Usage - Overall

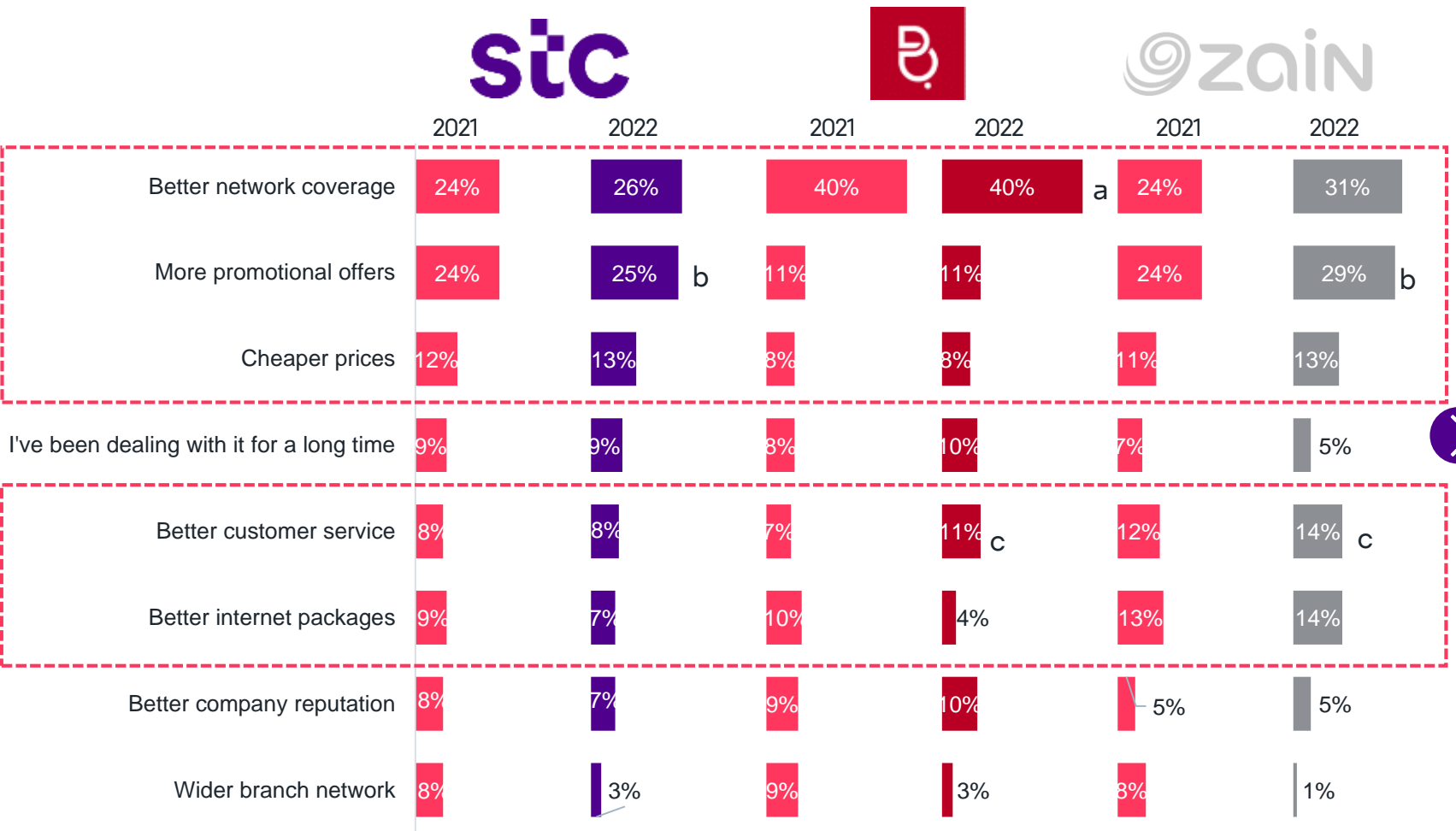


Multi Sim Usage - stc



stc has relatively low mentions on Network coverage and Customer service

Reasons of Selecting a Service Provider as Main Brand



- Key Insights
- a)

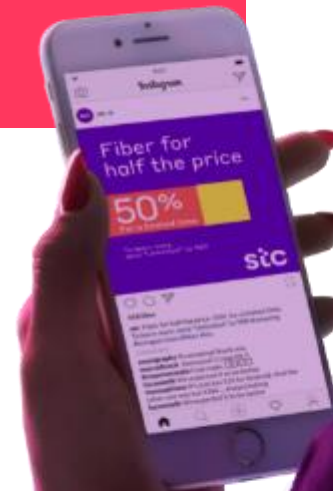
Batelco has highest mentions for Better network coverage which is hygiene when it comes to telecom sector
- b)

stc & Zain are doing well when it comes to promotional offers.
- c)

Both Batelco and Zain has improved on Customer service whereas stc remained largely stable



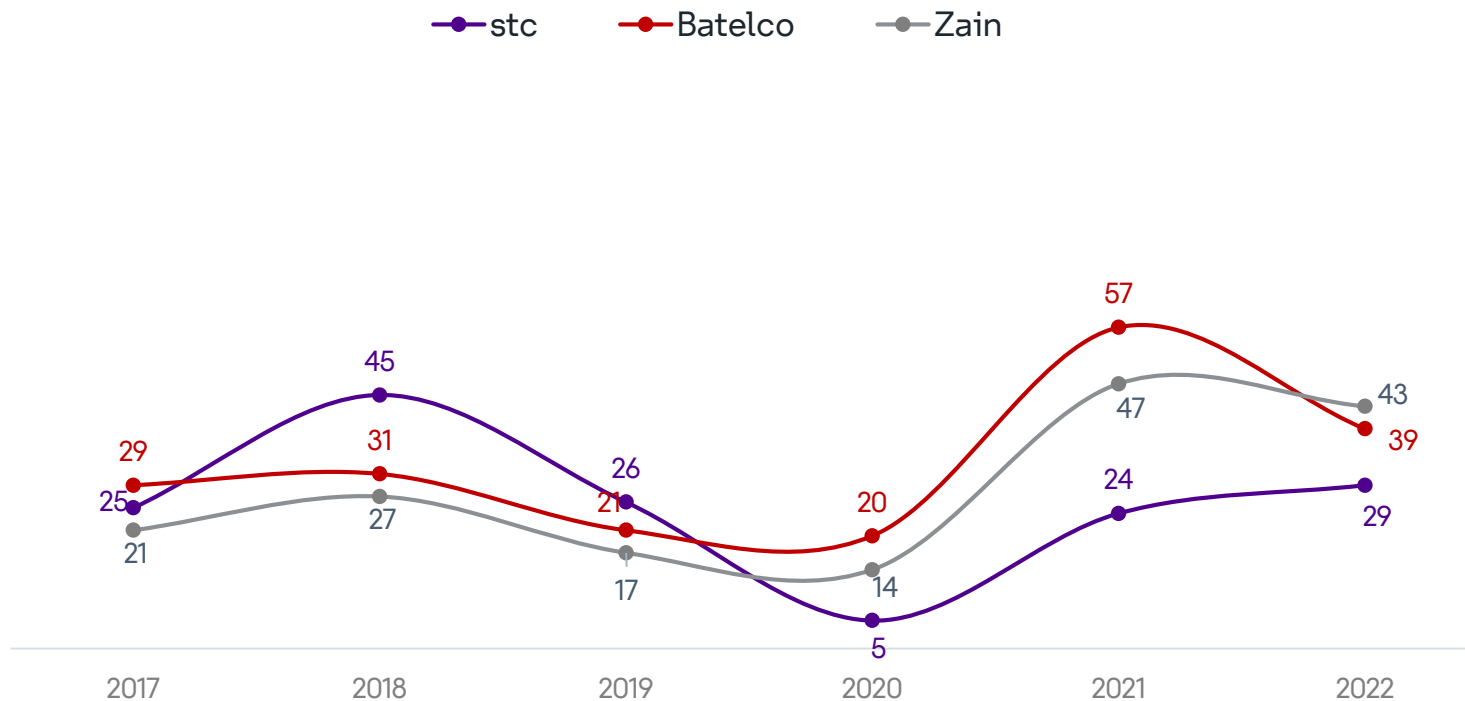
# NPS



stc

stc is the only brand that witnessed an increase in terms of NPS score compared to the last year

## Mobile Voice NPS Trends



### Key Insights

- Batelco has experienced a significant decline in NPS as compared to last wave and became the second brand in the category
- Zain also witnessed a slight decline in NPS, however holds the first position in the category

# stc has higher NPS amongst Men, 18-34 years old, Bahraini & Asians

## stc Mobile Voice Net Promoters Score (NPS) - Demographics

	% of Promoters (9s & 10s)	-	% of Detractors (0 through 6)	=	NPS 2021	NPS 2022
Overall	45%		17%		24	29
Men	47%		15%		19	32
Women	41%		20%		35	21
18-24 Years	40%		12%		15	27
25-34 Years	51%		14%		22	36
35-49 Years	41%		18%		31	23
50+ Years	37%		22%		24	15
Bahraini	48%		22%		18	26
Arab	38%		29%		19	10
Asian/ Others	60%		13%		34	47
Manama	46%		12%		29	35
Northern	44%		15%		18	29
Southern	34%		29%		28	5
Muharraq	45%		15%		20	30



**Key Insights**

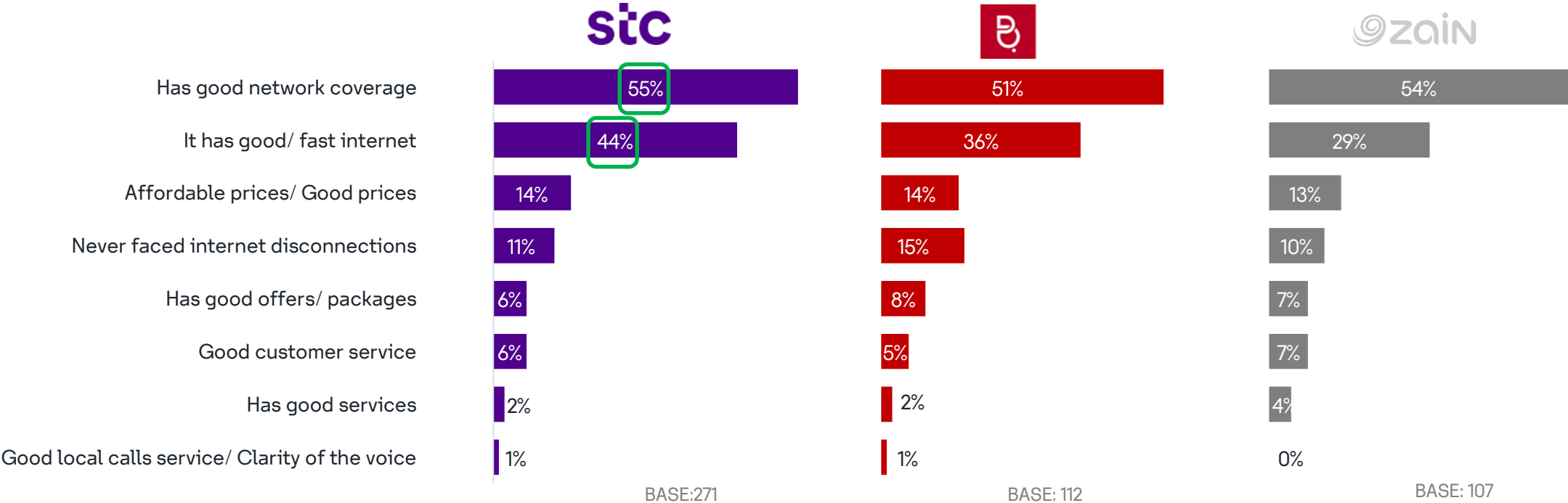
stc has low NPS scores amongst Women, Higher age groups (35+ years), Expat Arabs and Southern regions



# stc has highest mentions for Network coverage and Fast internet

## Reasons of Promoting– Mobile Voice

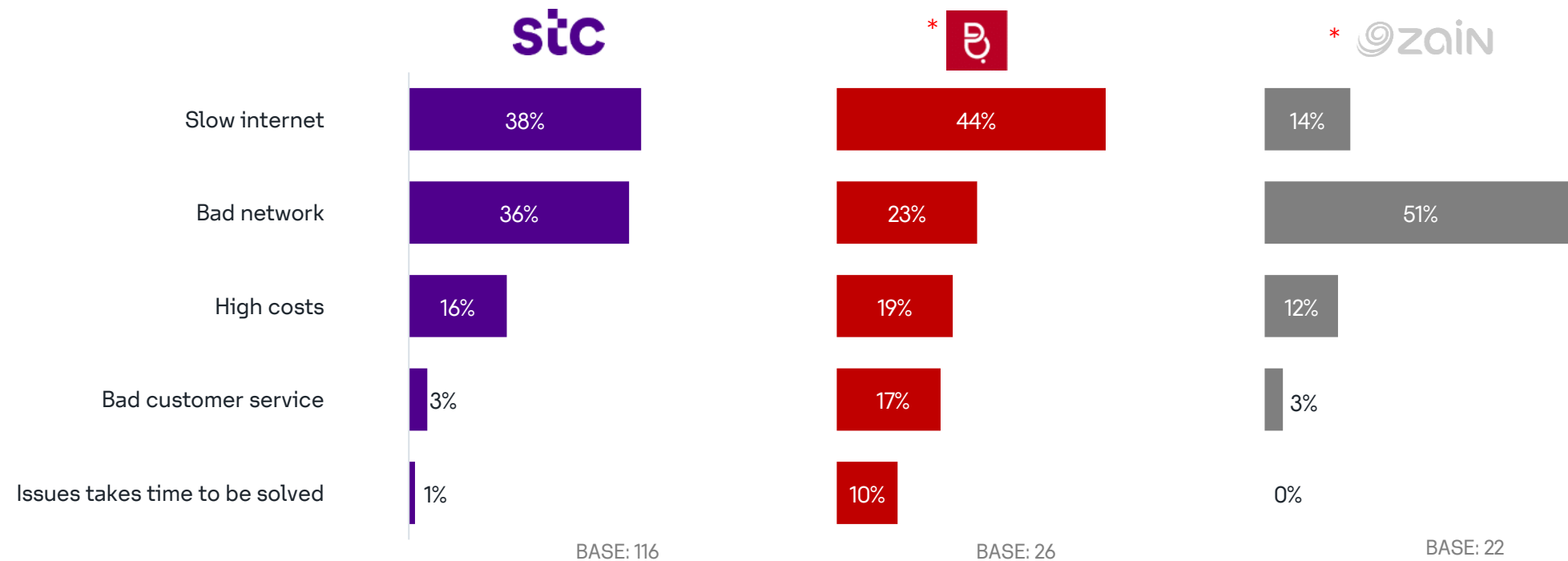
### Promoters



# Slow internet and Bad Network are the core reasons of detracting the brands

## Reasons of Detracting– Mobile Voice

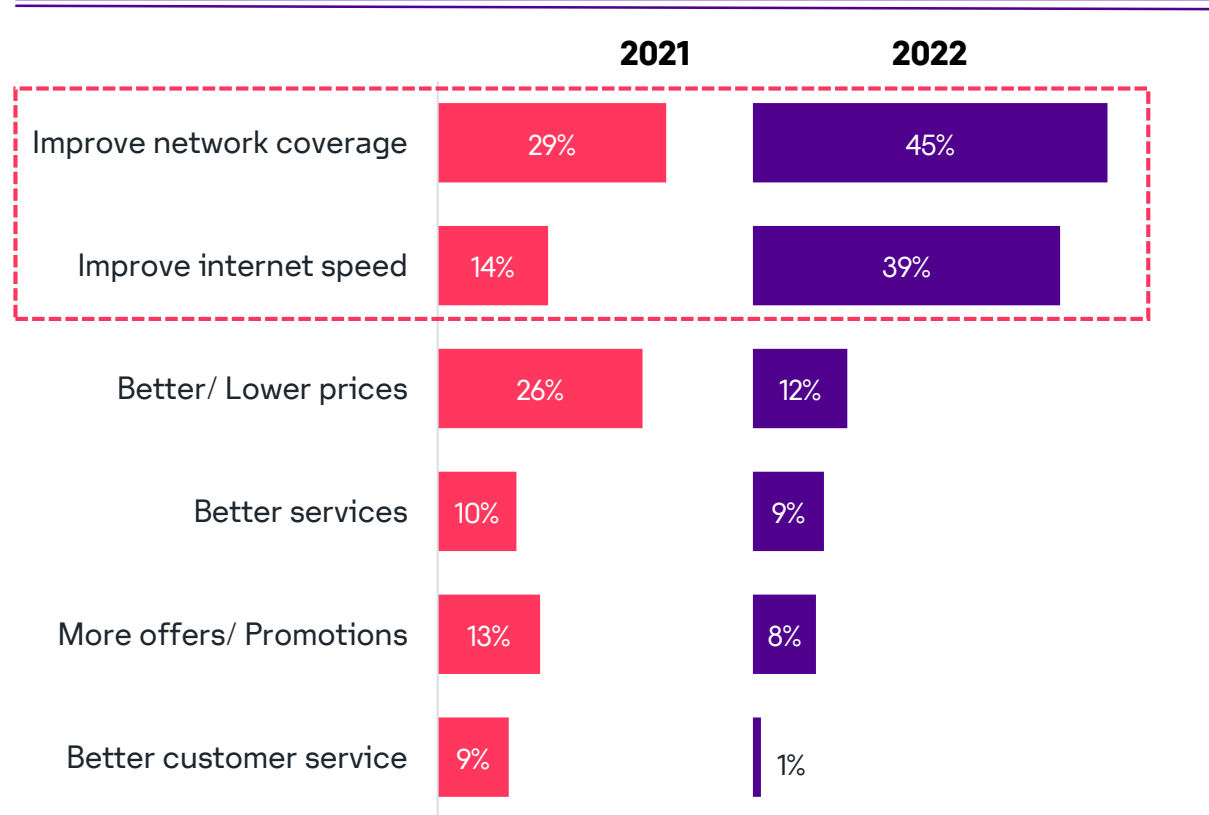
### Detractors



# Improvement in Network coverage and Internet speed may improve stc mobile voice NPS

## Improvements on Mobile Voice NPS for stc

### Improvement areas for a better NPS



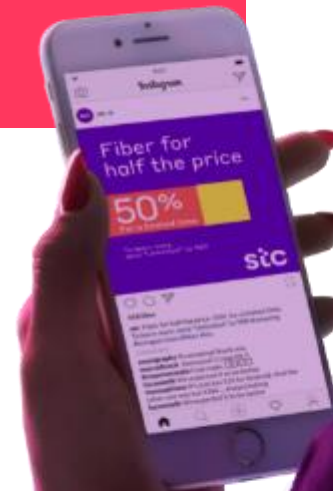
### Key Insights

- Mentions to **improve Network coverage and Internet speed** have further increased as compared to last wave





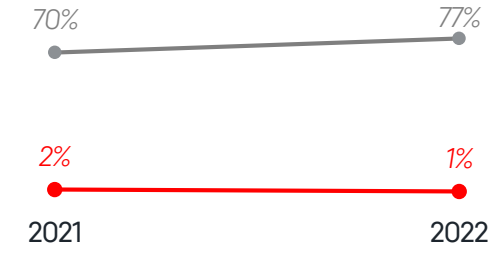
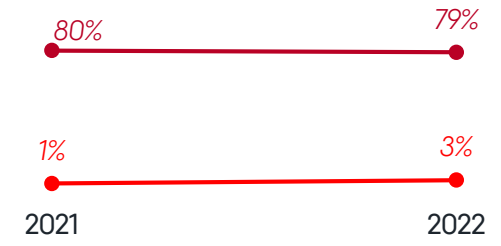
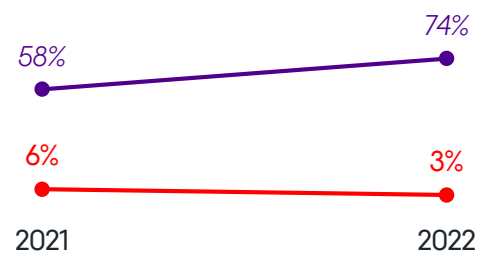
# Overall Satisfaction



stc stood 3<sup>rd</sup> in overall customer satisfaction where Batelco has the highest satisfactions

Overall Satisfaction – Trended (T3B/B3B Scores)

Global & Regional Benchmark  
Score (T3B) **68%**

- Batelco has the highest T3B satisfaction and remained largely stable in this wave
- stc & Zain satisfaction has significantly increased compared to the last year

## Trended Overall Satisfaction (T3B) for Mobile Voice

Score (T3B)

68%





stc has comparatively low satisfactions on category important attributes

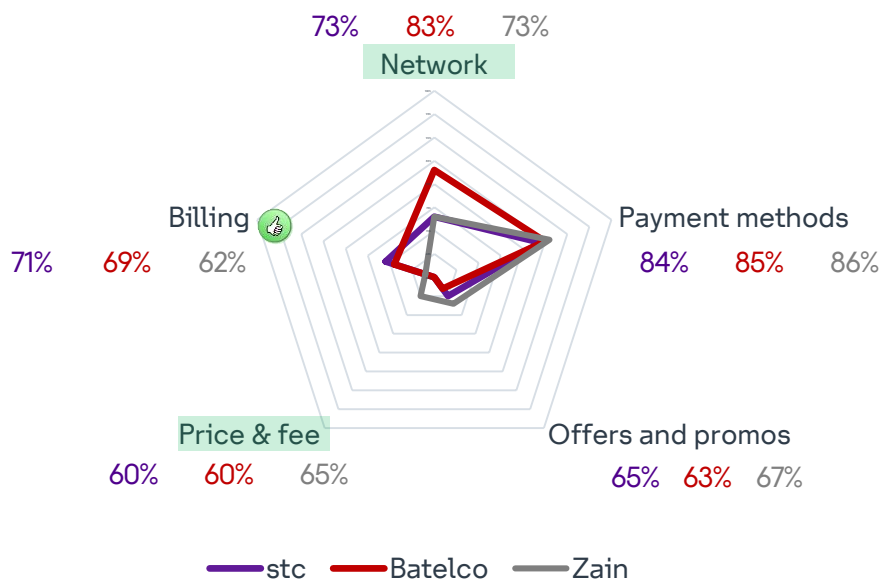
### Service Dimension Satisfaction Scores

	Satisfaction - Top 3 Box ratings	Importance	stc	Batelco	Zain
Journey points	Network	<div></div> 23.2	73%	83%	73%
	Payment methods	<div></div> 6.5	84%	85%	86%
	Offers and promos	<div></div> 7.9	65%	63%	67%
	Price & fee	<div></div> 17.4	60%	60%	65%
	Billing	<div></div> 8.0	71%	69%	62%
Touchpoints	Branch	<div></div> 5.7	73%	92%	88%
	Call center	<div></div> 7.9	72%	79%	85%
	Shop/Retail stores	<div></div> 5.0	78%	70%	85%
	Digital support	<div></div> 2.3	76%	70%	81%
	Website	<div></div> 4.1	83%	84%	79%
	Mobile app	<div></div> 2.6	88%	76%	88%
	Social media	<div></div> 9.5	81%	68%	81%

# stc has higher satisfactions for Billing, Social Media and Mobile app

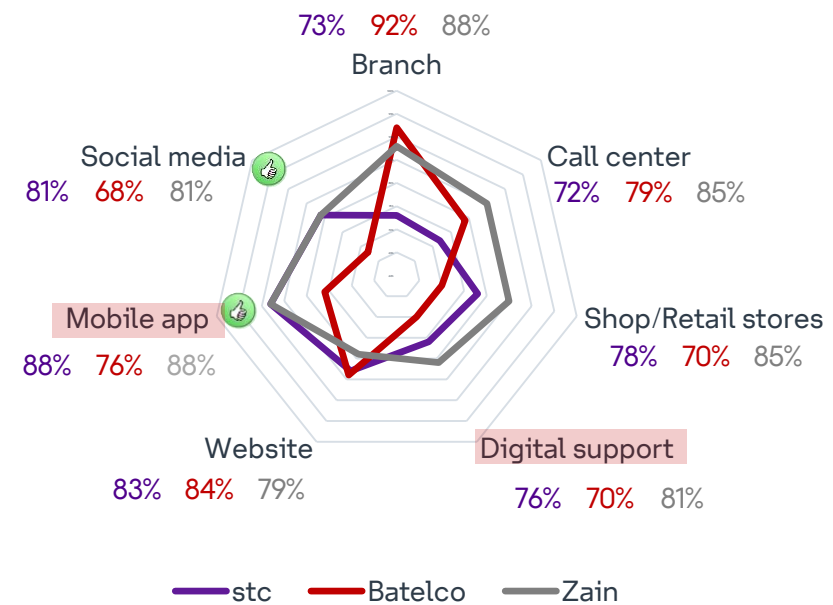
## Satisfaction with Performance Attributes (T3B)

### Journey Related Attributes – T3B Satisfaction



stc requires improvements on majority of journey related attributes

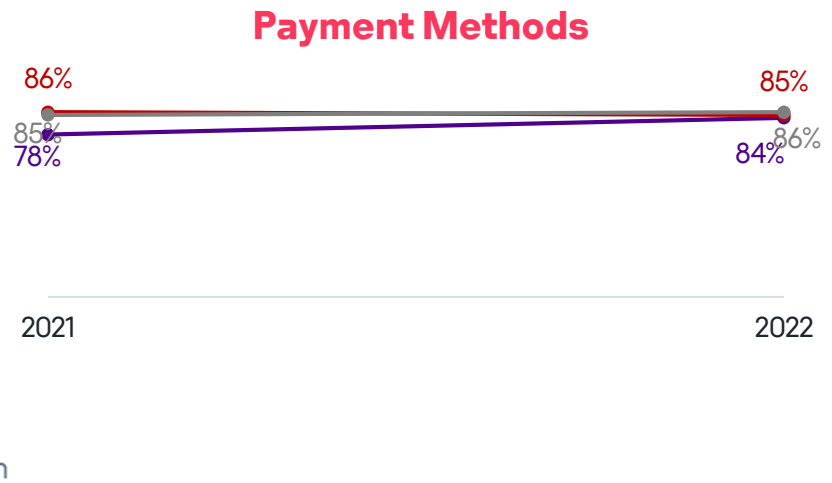
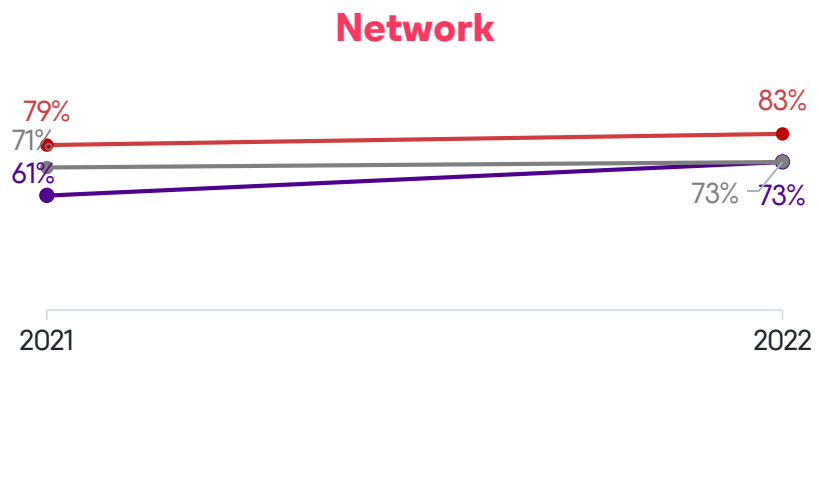
### Touchpoints – T3B Satisfaction



stc requires improvements on majority of touchpoints

Though stc has improved across journey points as compared to last wave, however still behind the competition

Service Dimension Satisfaction Scores – Journey Points (T3B)

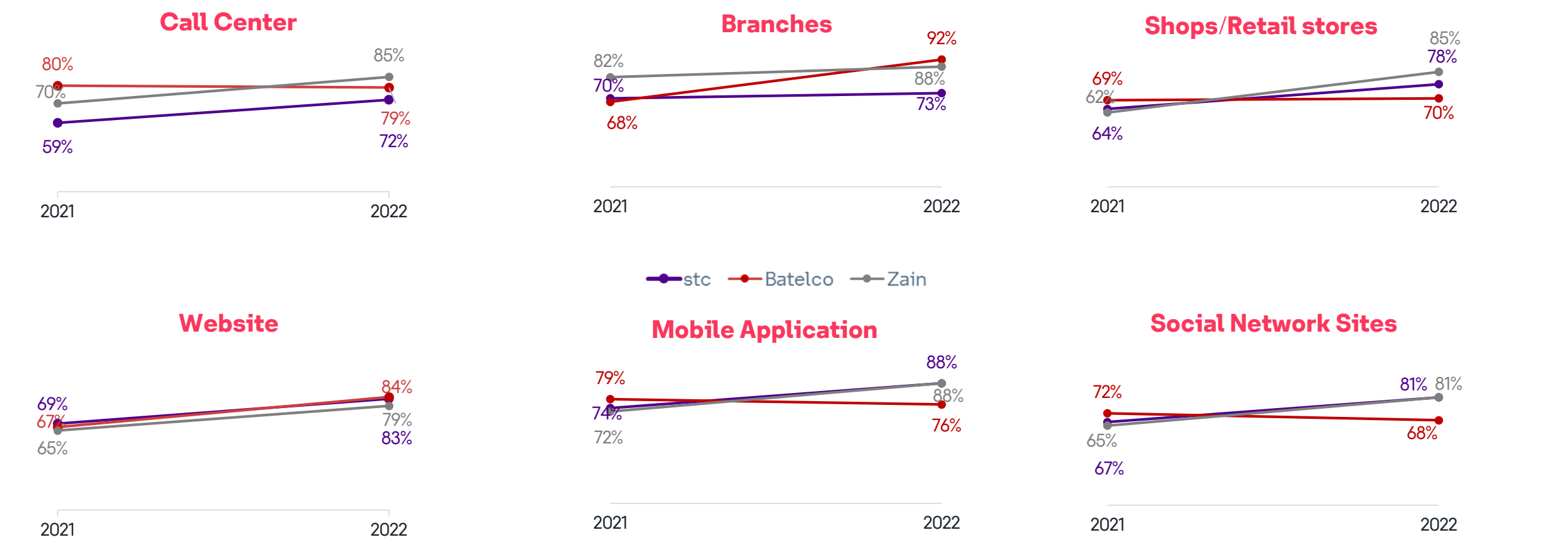


stc Base: 601    Batelco Base: 209    Zain Base: 206

Regarding your experience with your main service provider, can you please let us know how satisfied are you with each of the criterion using a scale of 1-10 where "10 being totally satisfied" and "1 totally not satisfied"?

stc has shown improvements across touchpoints as compared to last year but still behind the competition

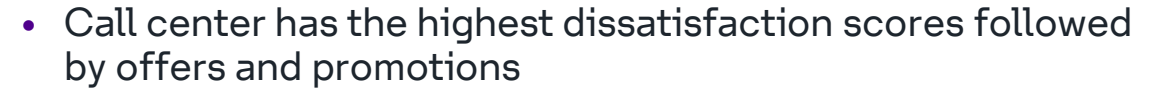
Service Dimension Satisfaction Scores – Touch Points (T3B)





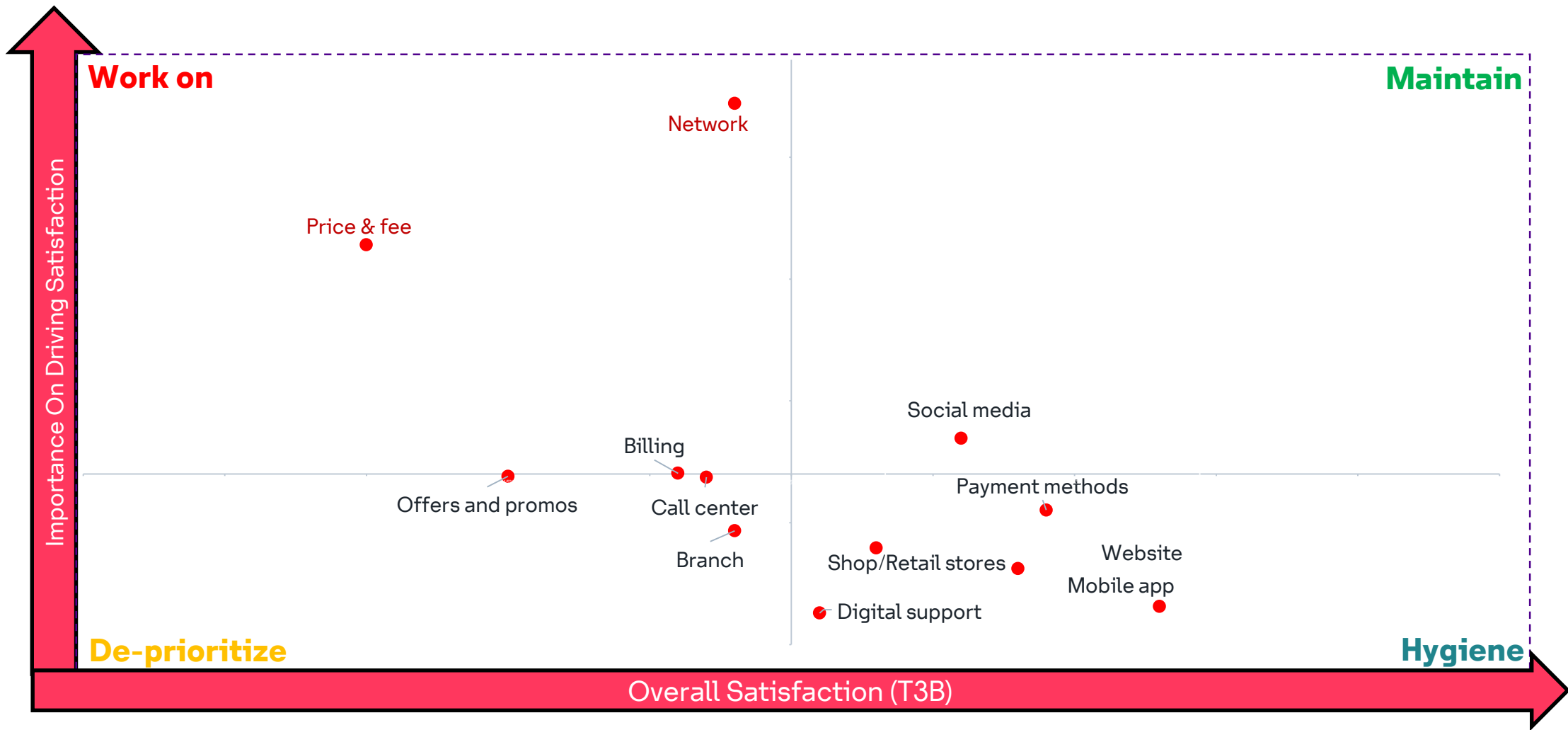
## Dissatisfaction - stc

## Key Insights

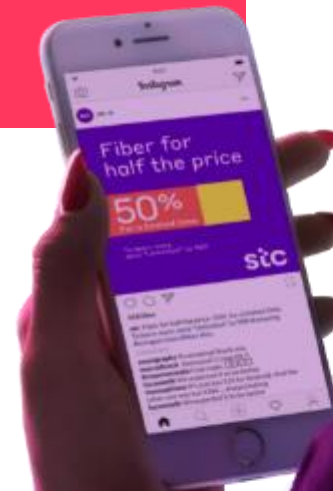


stc needs improvements on Network and Price & fee

Quadrant Analysis – stc Mobile Voice

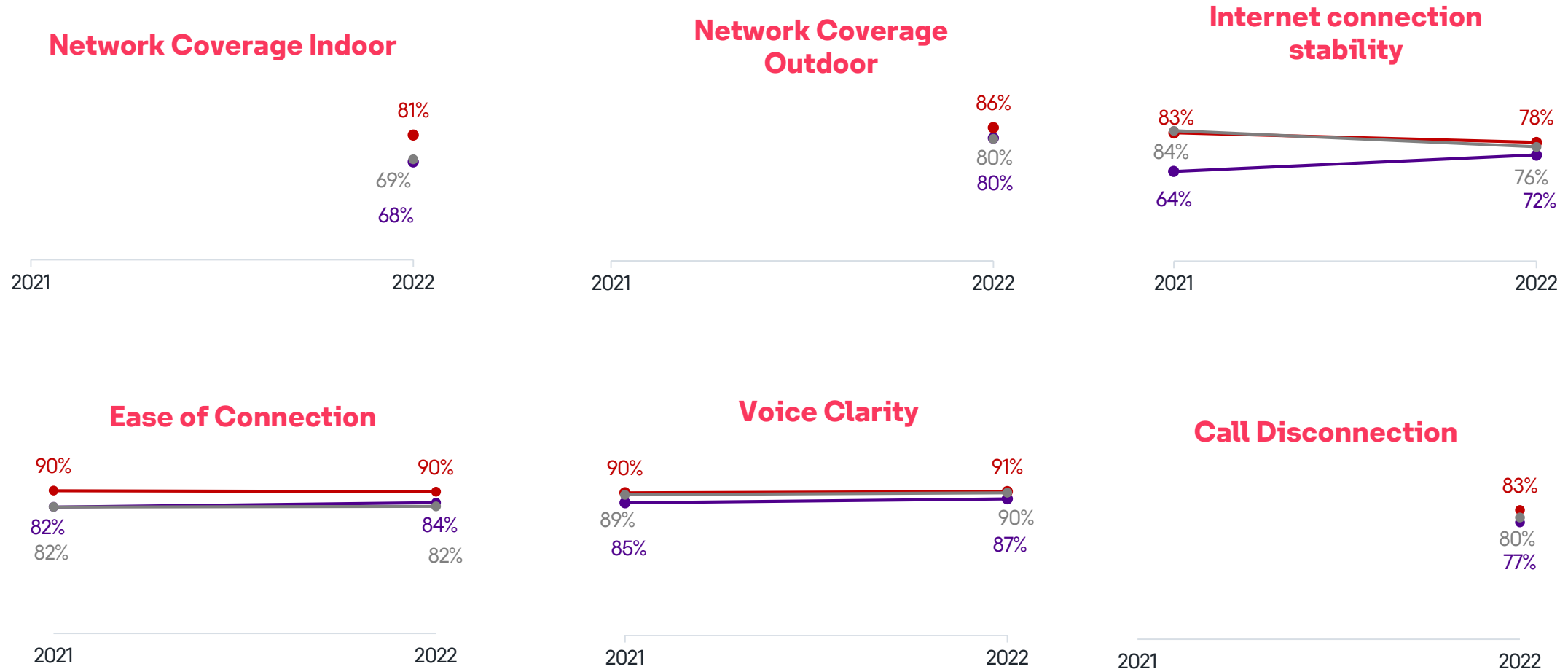


# Satisfaction Deep Dive



stc has improved on all network related sub-attributes but still remained third in the category

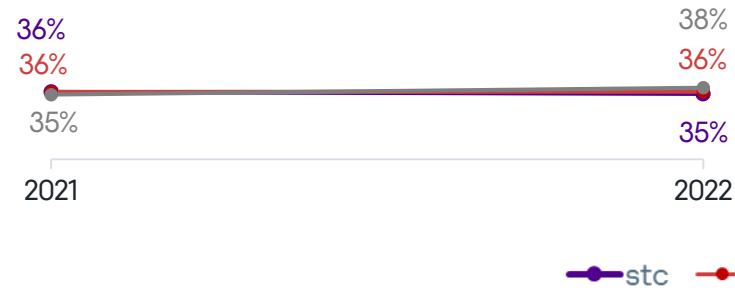
## Satisfaction (T3B) with Network sub-attributes



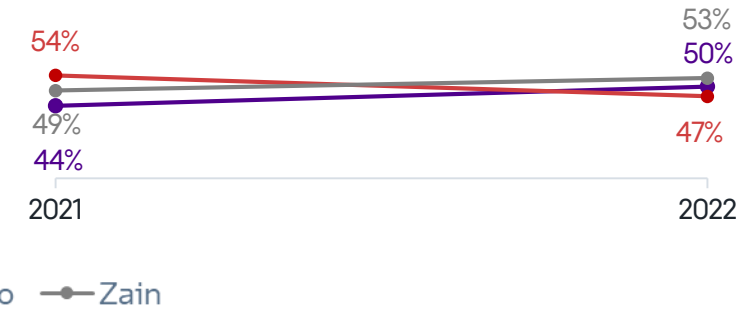
stc has improved on almost all the parameters of Price except 'Termination charges of breaking contract'

## Satisfaction (T3B) with Prices & Fee sub-attributes

Termination charges of breaking contract



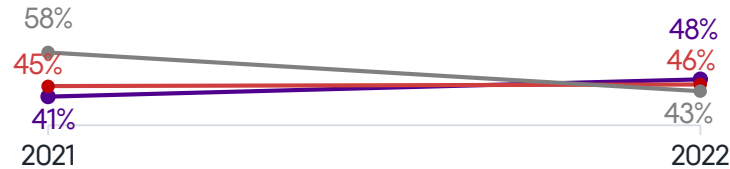
Prices of other value-added services



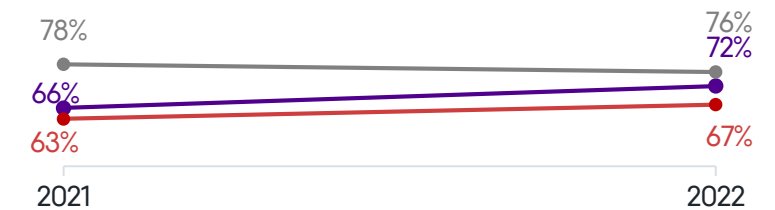
Price of purchasing a new voice line



Calls to international numbers



Local call rates (On-net & offnet)

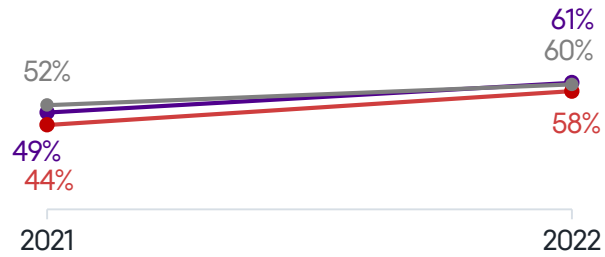




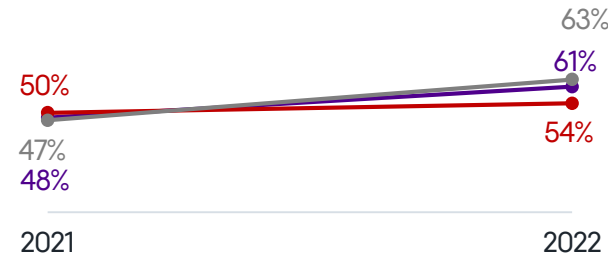
# stc has improved on all parameters of Offers & Promos

## Satisfaction (T3B) with Offers & Promotions sub-attributes

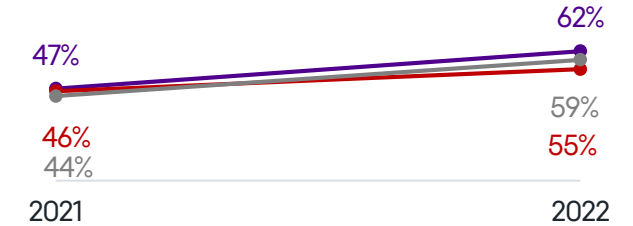
### Variety of offers & promotions



### Constant update of offers & promotions



### Suitability of offers & promotions

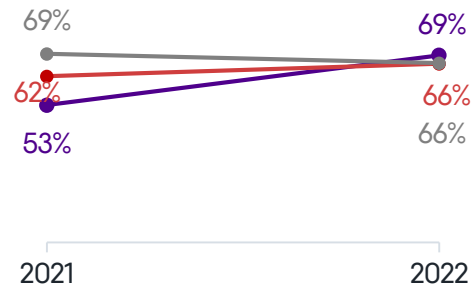


—●— stc —■— Batelco —■— Zain

stc has improved on all the payment method related attributes as compared to last wave

## Satisfaction (T3B) Payment Methods sub-attributes

### Payment Grace period

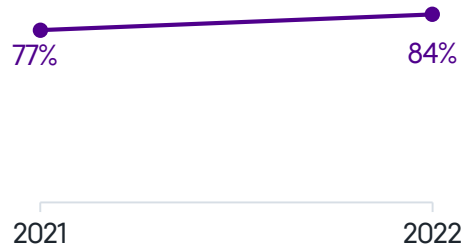


### Ease of quick pay option

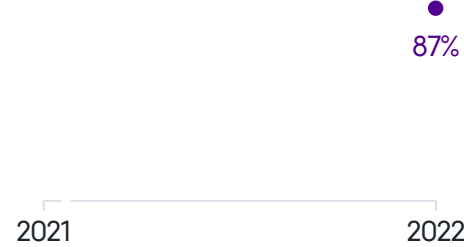


stc Batelco Zain

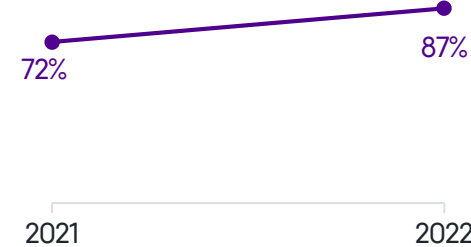
### Ease of use stc app



### Ease of use stc pay



### Ease of use stc express machines



### Ease of paying at stc branch

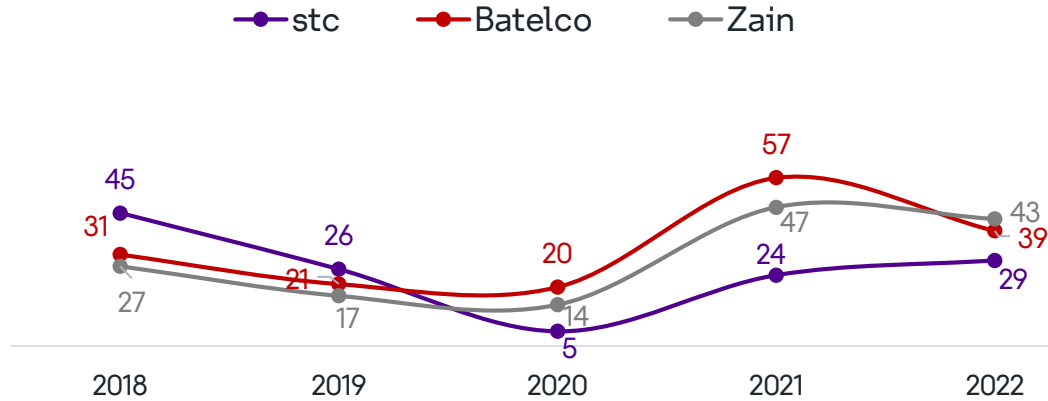


# Summary & Way Forward

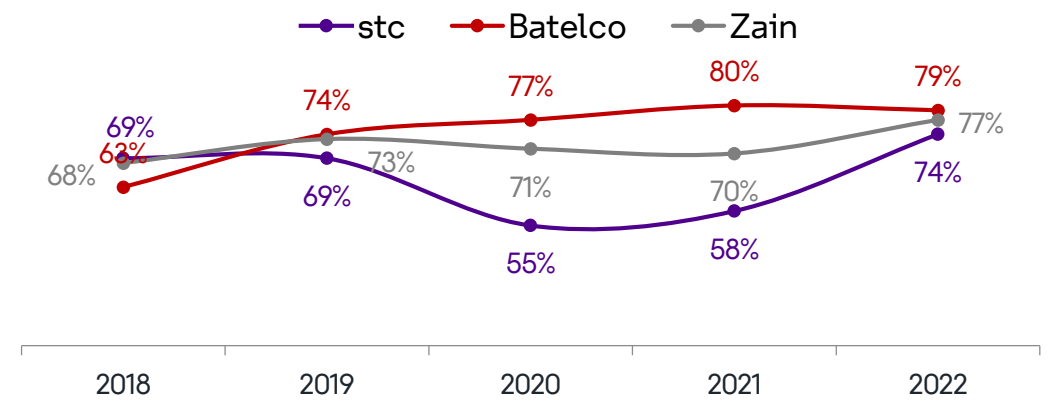


# Summary Mobile Voice – NPS & Satisfaction

NPS



Satisfaction (T3B)



## stc's satisfaction & recommendation is growing in Mobile Voice Segment

- stc has shown improvements in Mobile voice segment through improving on both NPS and Satisfaction
- **Network, Internet speed** and **Prices** are the top factors of promoting, detracting and mentioned as areas of improvements for stc

### Reasons of promoting stc

Has good network coverage	55%
It has fast internet	44%
Affordable prices	14%
Never faced internet...	11%

### Reasons of detracting stc

Slow internet	38%
Bad network	36%
High costs	16%

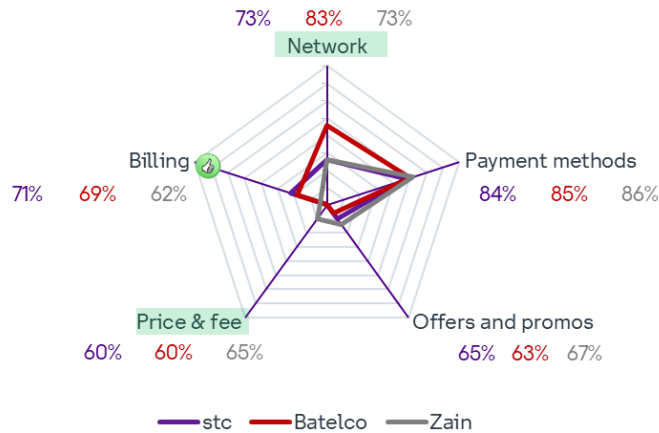
### Suggestions to improve stc

Improve network coverage	45%
Improve internet speed	39%
Better/ Lower prices	12%

# Summary Mobile Voice – Journey & Touchpoints performance

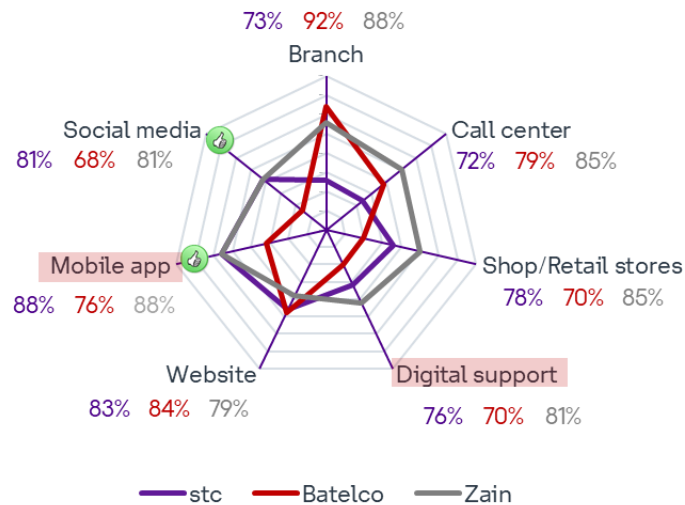
1

## Performance on Customer Journey



2

## Performance on Customer Touchpoints



## Findings

1. In Mobile voice category, **Network** and **Price & fee** emerges as most important category attributes where **stc has comparatively low satisfactions**, however secured higher satisfactions on Billing
2. stc has comparatively **low satisfactions across touchpoints** except for **Social media** and **Mobile application**

## Way forward

- stc needs to **improve on both Network and Prices & fee** in order to further enhance the satisfaction as well as NPS
- Since majority of customers are also using internet on their voice line, hence **stc should improve on internet speed** as well
- stc must **deliver a very good customer experience** on both Traditional as well as digital touchpoints





## Study specifics



## Mobile Voice



## Home Broadband



## Mobile Broadband



## Touchpoints Evaluation

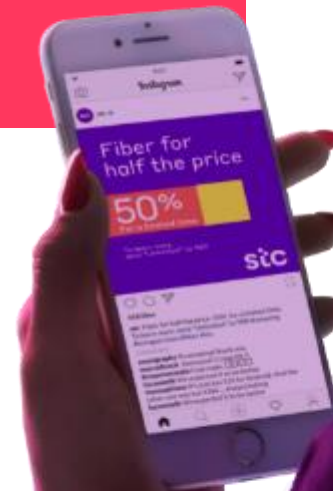
01 Net Promoter Score (NPS)

02 Overall Satisfaction

03 Satisfaction Deep Dive

04 Summary & Way Forward

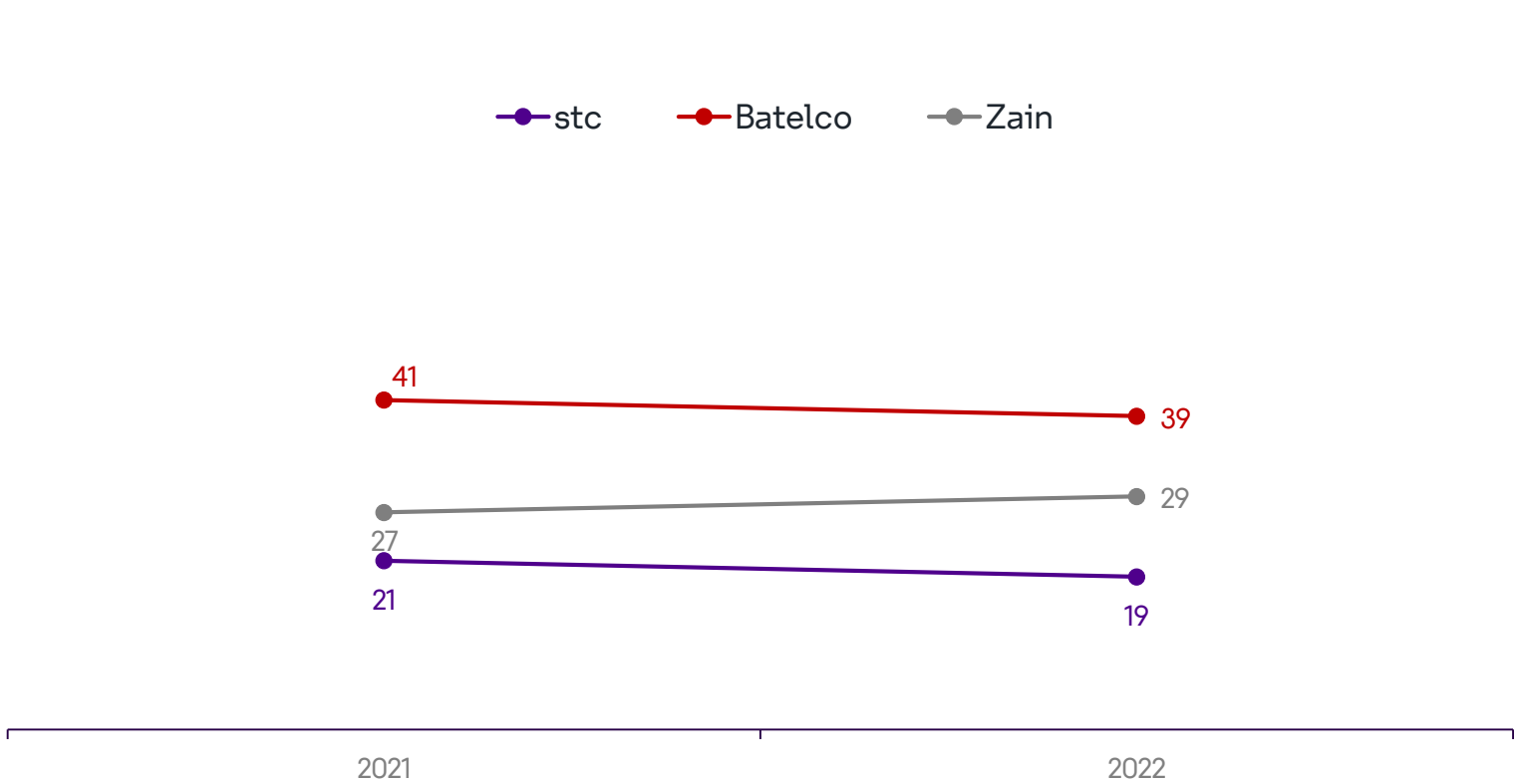
# NPS



stc

All brands remained largely stable

# Home Broadband NPS Trends



## Key Insights

- No significant change has been observed for any of the brand

stc has low NPS among Women, Upper age bands and Asians as compared to last wave

## Home Broadband NPS Scores By Demographics – stc

	% of Promoters (9s & 10s)	–	% of Detractors (0 through 6)	=	NPS 2021	NPS 2022
<b>Overall</b>	<b>38%</b>		<b>19%</b>		21	<b>19</b>
<b>Men</b>	<b>38%</b>		<b>21%</b>		11	<b>17</b>
<b>Women</b>	<b>37%</b>		<b>15%</b>		33	<b>22</b>
<b>18-24 Years</b>	<b>36%</b>		<b>23%</b>		33	<b>13</b>
<b>25-34 Years</b>	<b>43%</b>		<b>18%</b>		22	<b>25</b>
<b>35-39 Years</b>	<b>37%</b>		<b>22%</b>		–8	<b>15</b>
<b>40-49 Years</b>	<b>33%</b>		<b>16%</b>		24	<b>17</b>
<b>50+ Years</b>	<b>39%</b>		<b>20%</b>		34	<b>19</b>
<b>Bahraini</b>	<b>36%</b>		<b>21%</b>		3	<b>15</b>
<b>Arab</b>	<b>52%</b>		<b>19%</b>		18	<b>33</b>
<b>Asian/ Others</b>	<b>36%</b>		<b>16%</b>		44	<b>20</b>
<b>Manama</b>	<b>37%</b>		<b>20%</b>		25	<b>17</b>
<b>Northern</b>	<b>44%</b>		<b>20%</b>		6	<b>24</b>
<b>Southern</b>	<b>32%</b>		<b>18%</b>		16	<b>14</b>
<b>Muharraq</b>	<b>37%</b>		<b>20%</b>		36	<b>17</b>

### Key Insights

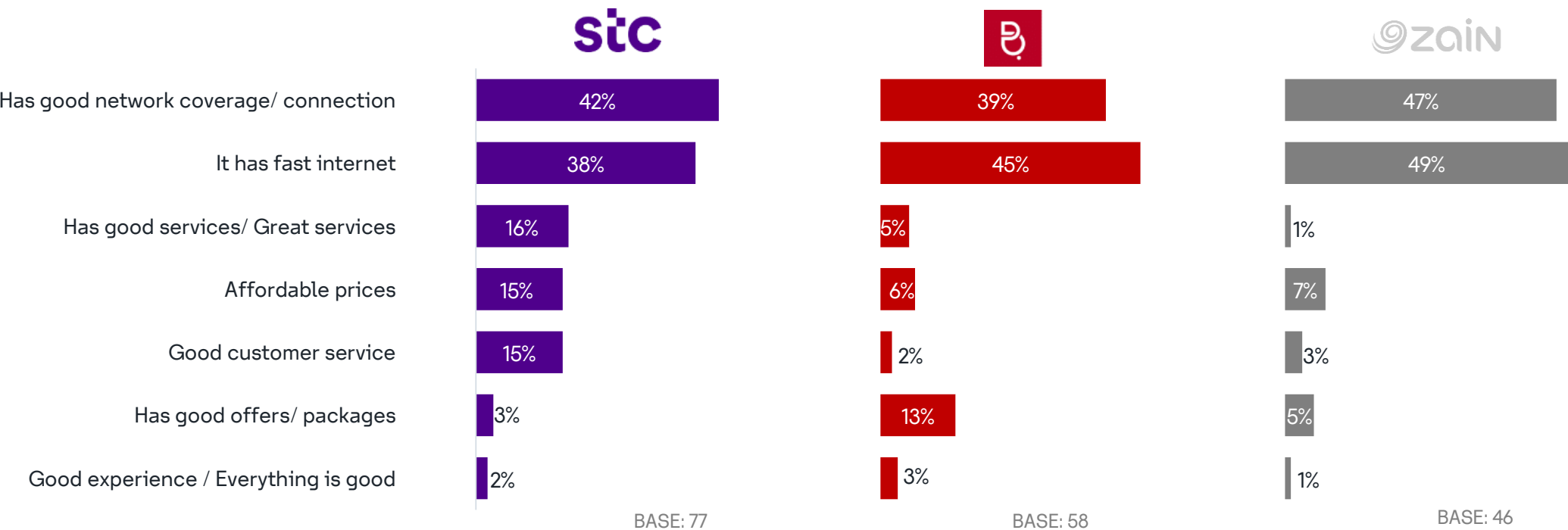
stc NPS has improved as compared last wave among Male, 25-39 years old, Bahraini & Arabs and residents of Northern region



# Good network and Fast internet are the core reasons to recommend any brand

## Reasons of Promoting– Home broadband

### Promoters

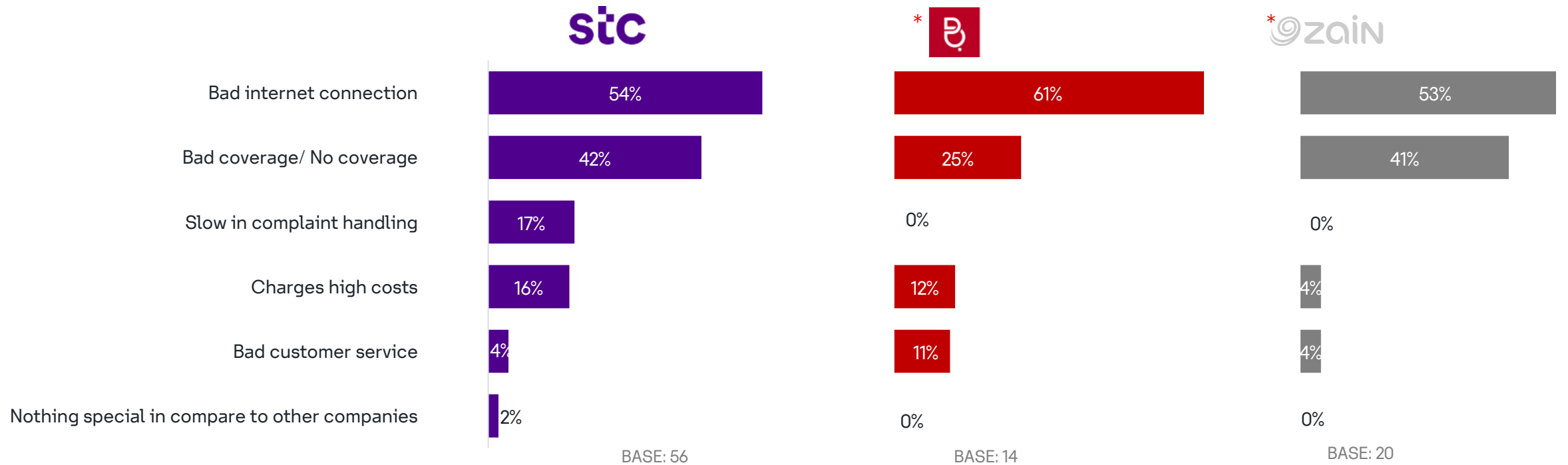




# Bad internet connection and No coverage are the top mentioned attributes to detract any brand

## Reasons of Detracting– Home broadband

### Detractors

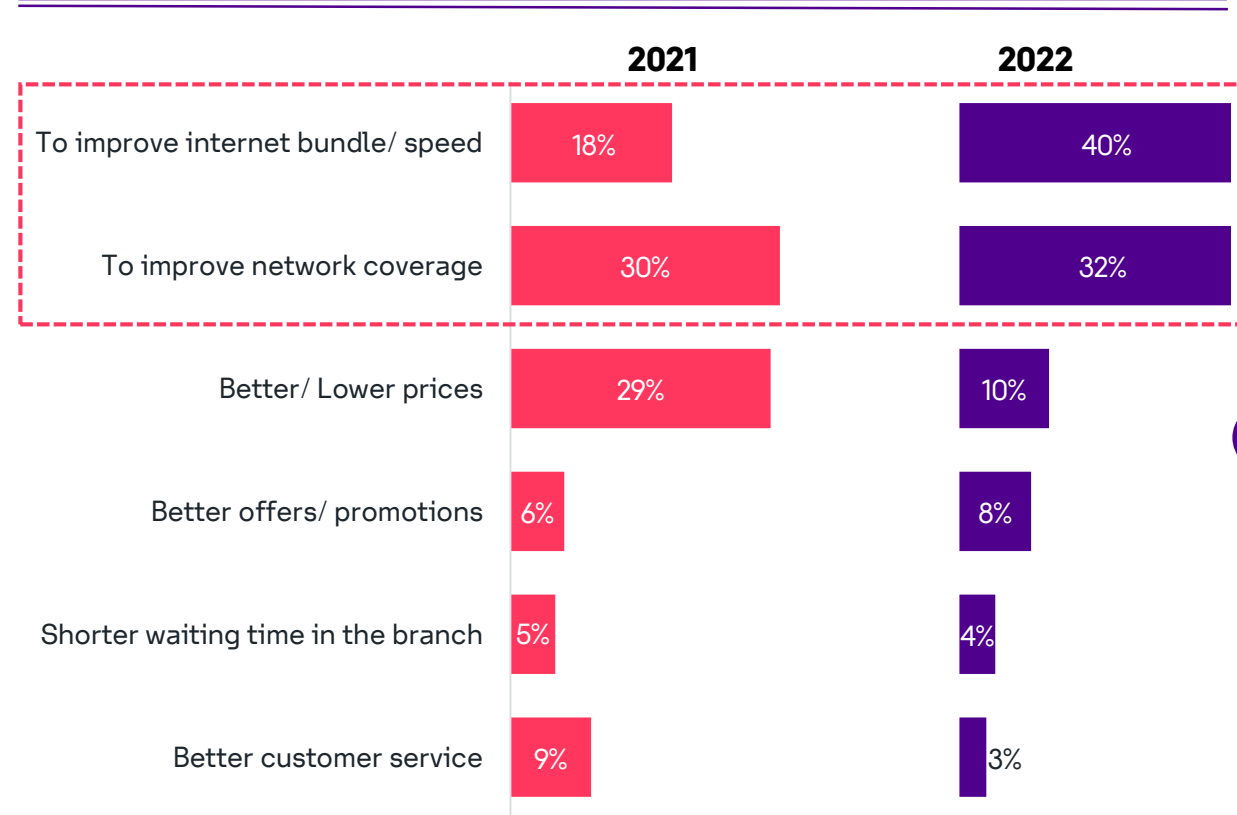


\* Low Base

# stc users are suggesting to improve Network coverage and Internet speed

## Improvements on Home Broadband NPS for stc

### Improvement areas for a better NPS

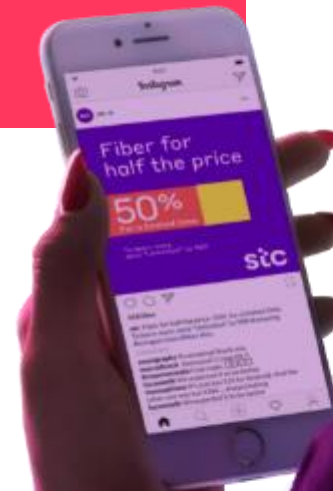


### Key Insights

- Internet speed/bundles and network coverage have higher mentions and increased in this wave



# Overall Satisfaction

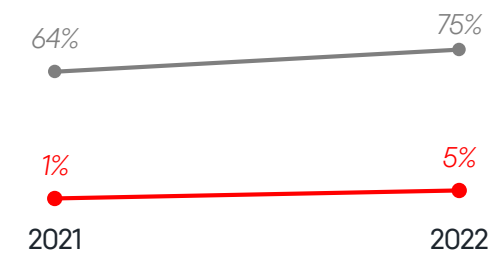
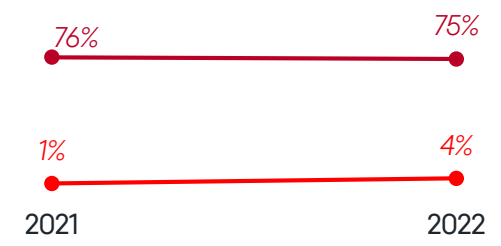
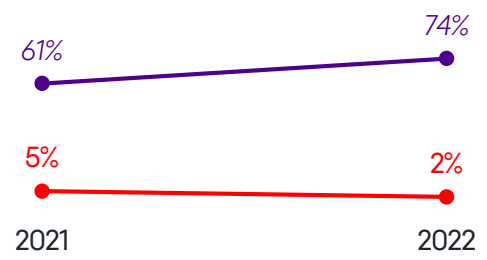


# Almost 3/4<sup>th</sup> of the respondents are satisfied with their current brand

## Overall Satisfaction – Trended

Global & Regional Benchmark

Score (T3B) **68%** 



- stc home broadband satisfaction scores has significantly increased and dissatisfaction scores are slightly decreased compared to the last year
- Batelco & Zain are highly competing in terms of satisfaction scores

stc has relatively low satisfactions on Network whereas higher satisfactions on Price & fee

Service Dimension Satisfaction Scores

	Satisfaction - Top 3 Box ratings	Importance	stc	Batelco	Zain
Journey points	Network	21	72%	78%	70%
	Payment methods	9	86%	86%	88%
	Offers and promos	7	68%	53%	59%
	Price & fee	17	62%	58%	57%
	Billing	8	68%	72%	68%
Touchpoints	Branch	5	73%	97%	67%
	Call center	9	64%	77%	69%
	Shop/Retail stores	5	78%	70%	85%
	Digital support	5	79%	73%	90%
	Website	5	82%	78%	79%
	Mobile app	6	85%	80%	79%
	Social media	4	81%	68%	81%

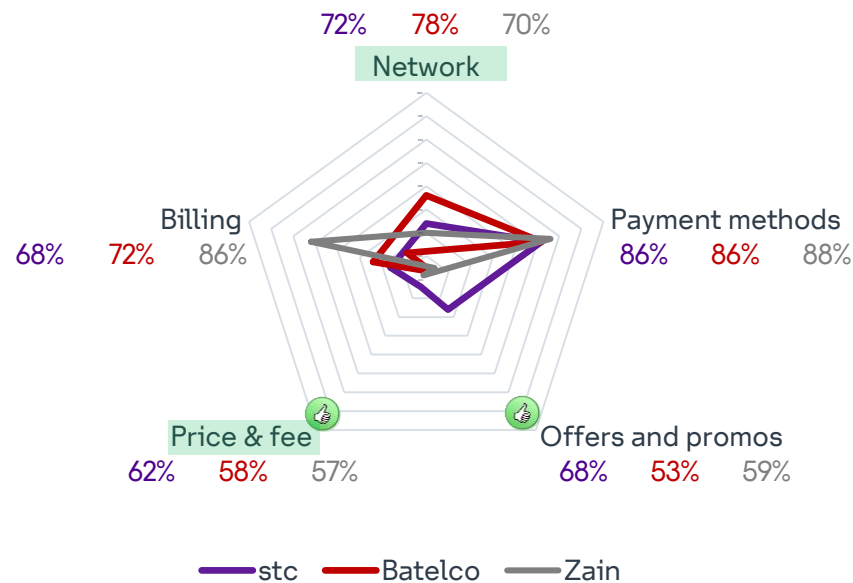
stc Base: 260    Batelco Base: 177    Zain Base: 131



stc has relatively low satisfactions on Network, Billing, Branch and Call center

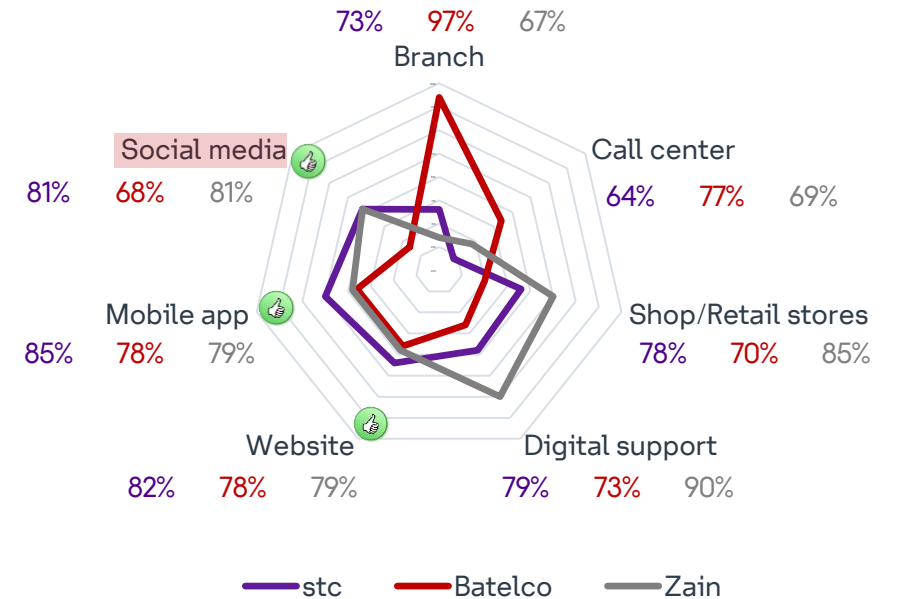
## Satisfaction With Performance Attributes (T3B)

### Journey Related Attributes – T3B Satisfaction



stc requires improvements on Network which is the most important attribute

### Touchpoints – T3B Satisfaction



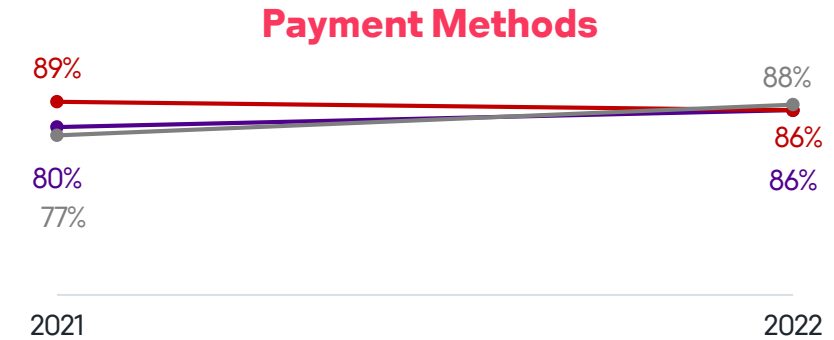
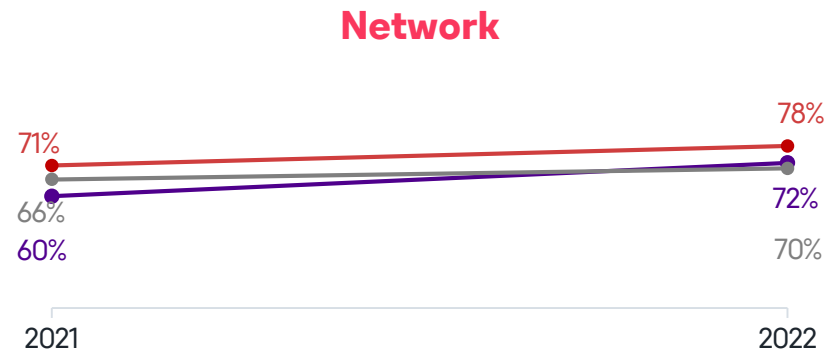
stc requires improvements primarily on traditional touchpoints





Though stc has improved across journey points as compared to last wave, however still behind the competition on Network and Payment methods

## Service Dimension Satisfaction Scores – Journey Points (T3B)

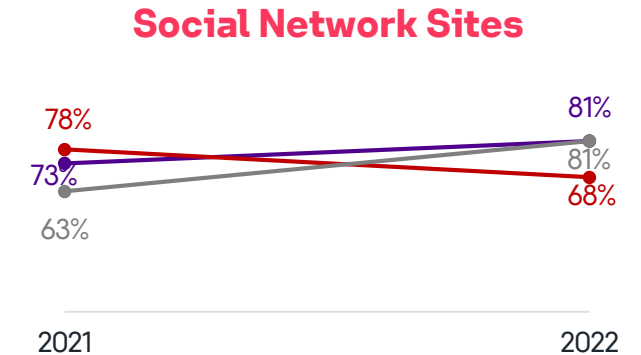
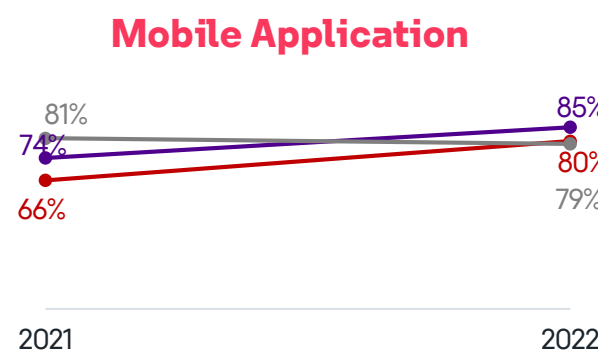
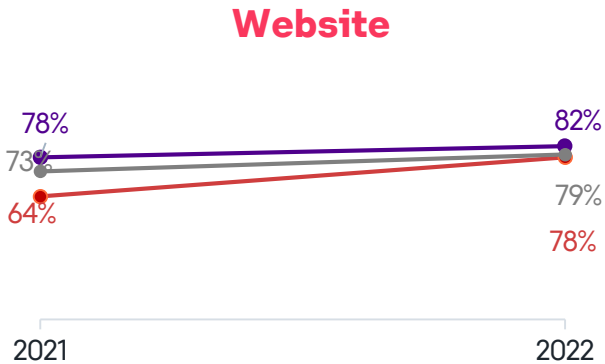
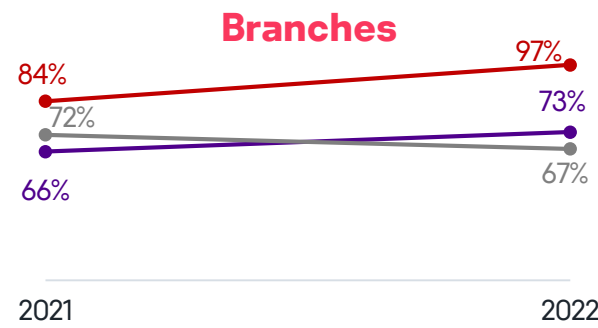
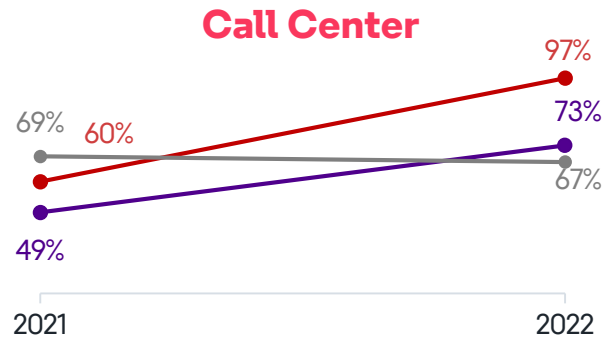


—●— stc —●— Batelco —●— Zain



stc has shown improvements across touchpoints as compared to last year

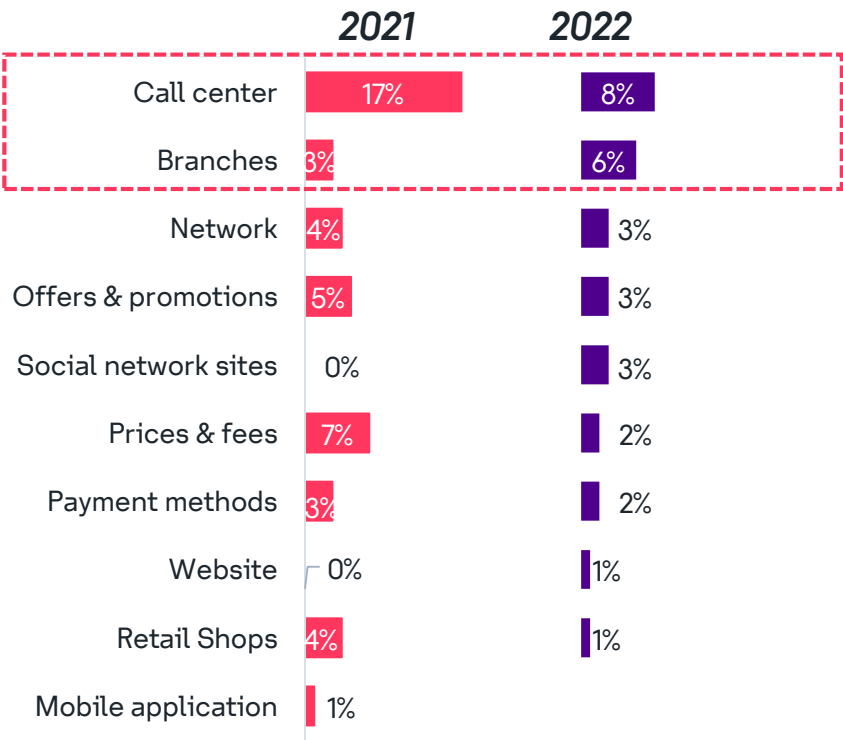
## Service Dimension Satisfaction Scores – Touch Points (T3B)



Though dissatisfactions for stc have dropped in this wave, however, call center owned the highest dissatisfactions, followed by branches

Dissatisfaction - stc

Dissatisfaction (B3B) – Trended



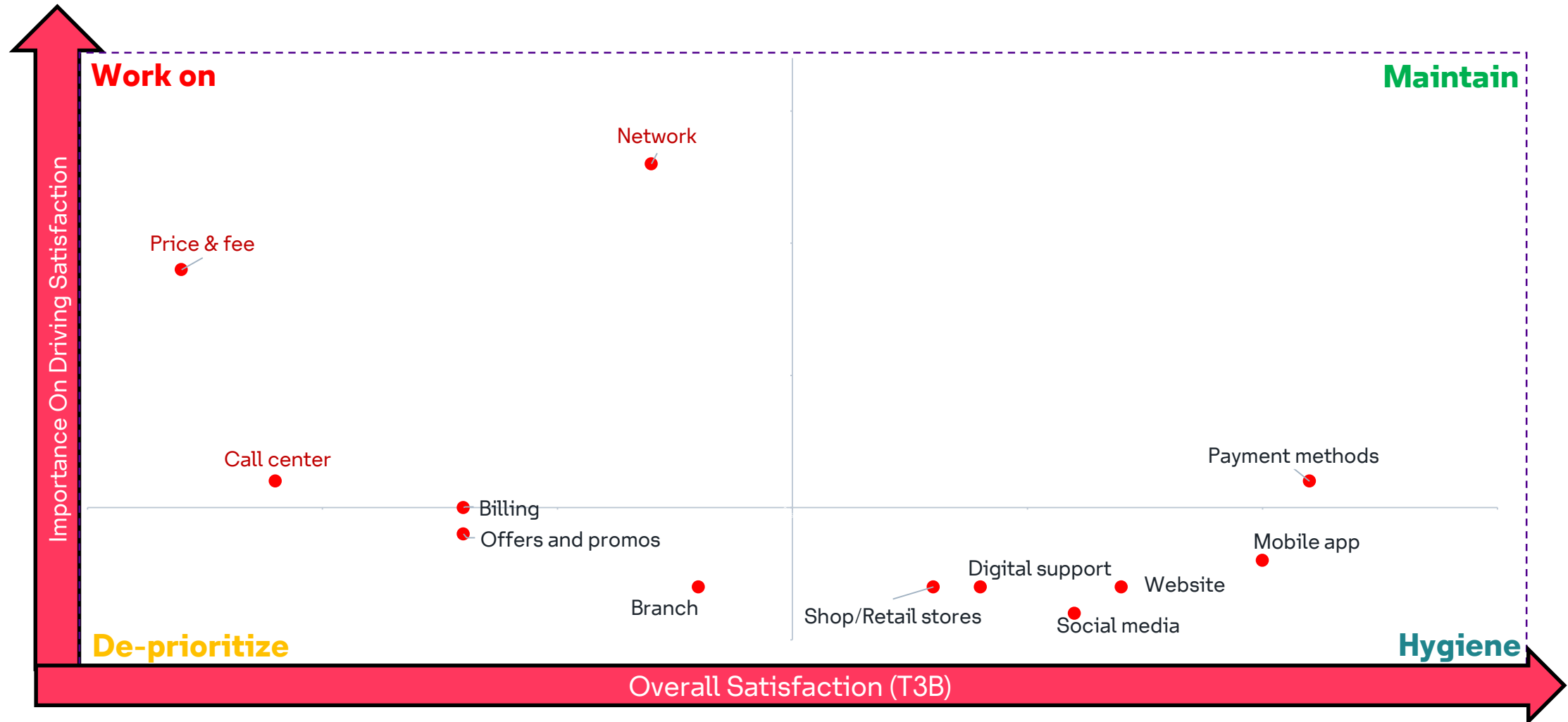
Key Insights

- Both Call center and Branches need improvements

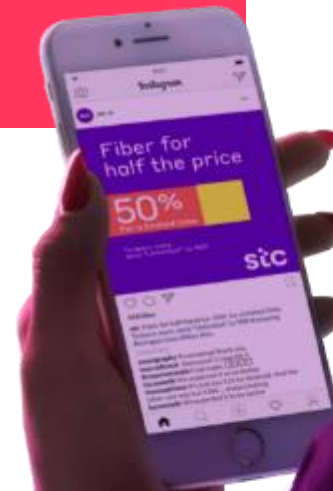
# Home Broadband – Overall Satisfaction

stc needs improvements on Network, Price & fee and Call center

## Quadrant Analysis – stc Home Broadband

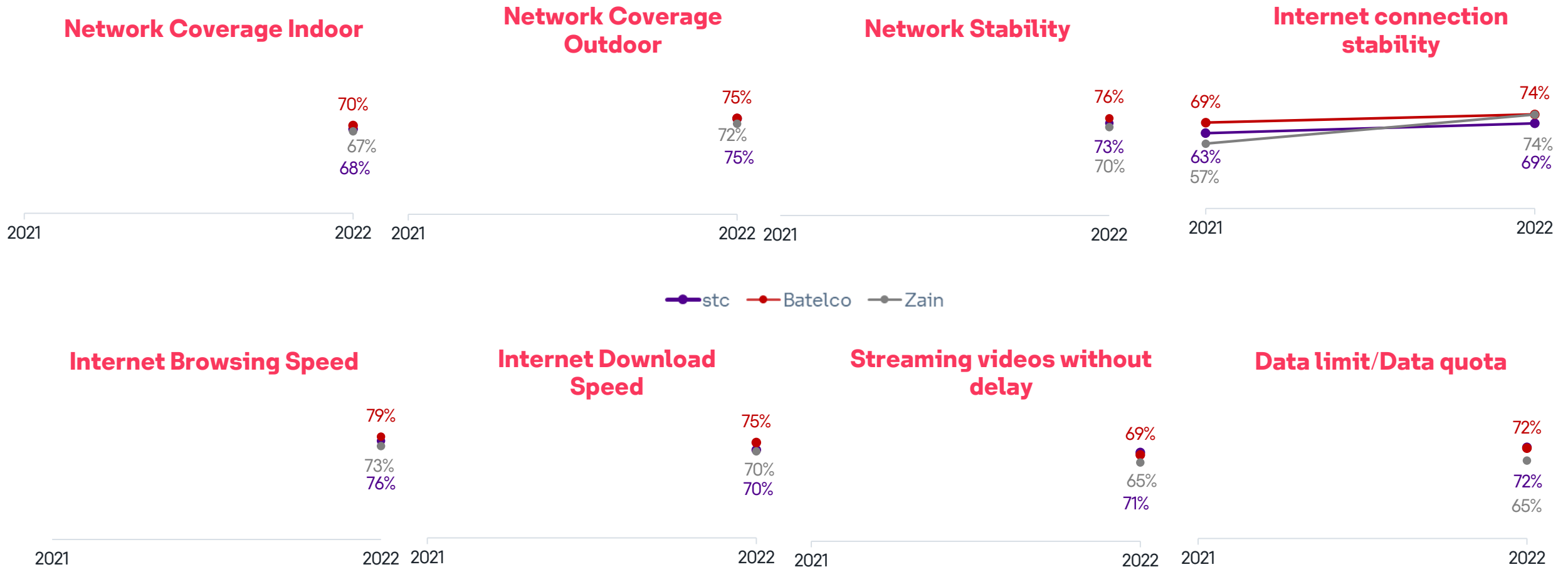


# Satisfaction Deep Dive



# stc stood third on majority of Network related attributes

## Satisfaction (T3B) with Network sub-attributes



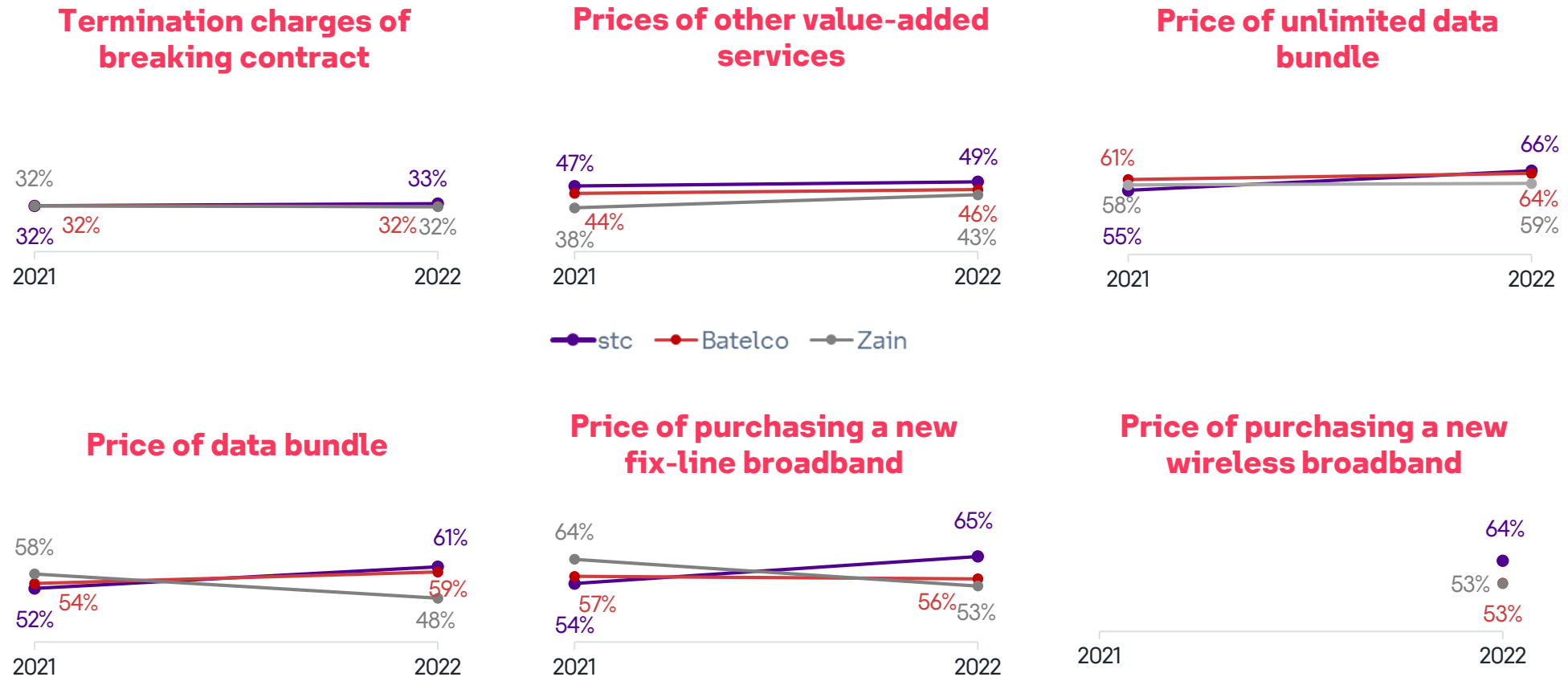
stc Base: 260 Batelco Base: 177 Zain Base: 131

B5. For each of the following criteria regarding the service provider network, I want you to tell me how satisfied are you with each of the criterion using a scale of 1-10 where "10 being totally satisfied" and "1 totally not satisfied"?



stc has improved on almost all the parameters of Price except 'Termination charges of breaking contract'

## Satisfaction (T3B) with Prices & Fee sub-attributes



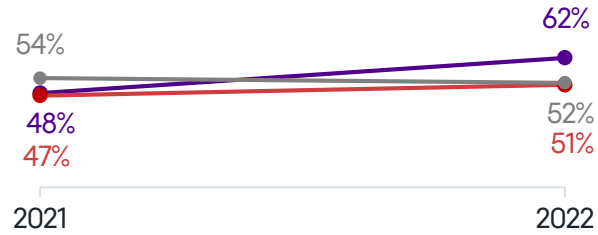
stc Base: 260 Batelco Base: 177 Zain Base: 131

B18. For each of the following criteria regarding the price, I want you to tell me how satisfied are you with each of the criterion using a scale of 1-10 where "10 being totally satisfied" and "1 totally not satisfied"?

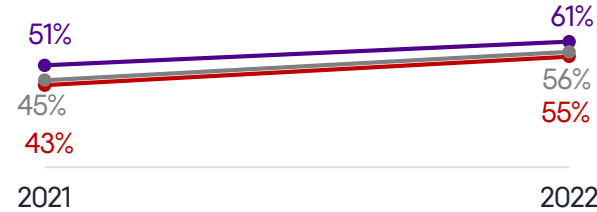
# stc has improved on all parameters of Offers & Promos

## Satisfaction (T3B) with Offers & Promotions sub-attributes

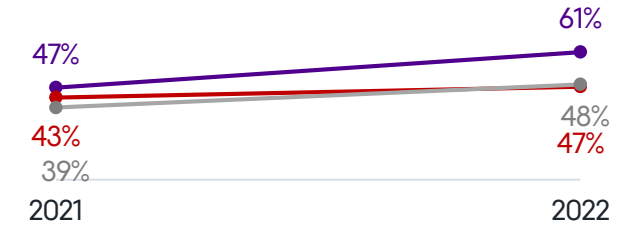
### Variety of offers & promotions



### Constant update of offers & promotions



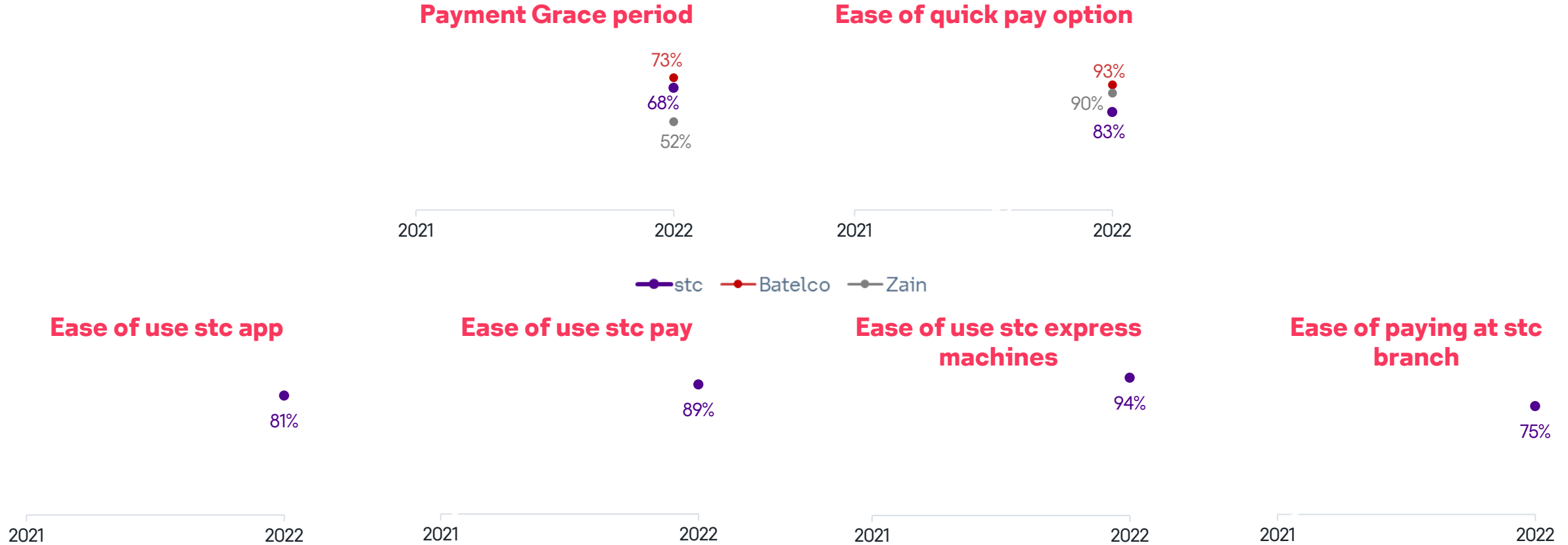
### Suitability of offers & promotions



—●— stc —●— Batelco —●— Zain

# stc is chasing competition on Payment grace period and Quick pay options

## Satisfaction (T3B) Payment Methods sub-attributes



stc Base: 260 Batelco Base: 177 Zain Base: 131

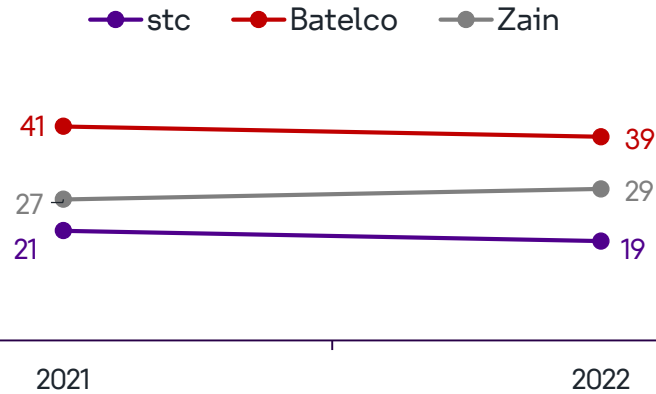
B8. Which of the following payment methods did you use in the past 3 months to complete your telecom payments

# Summary & Way Forward

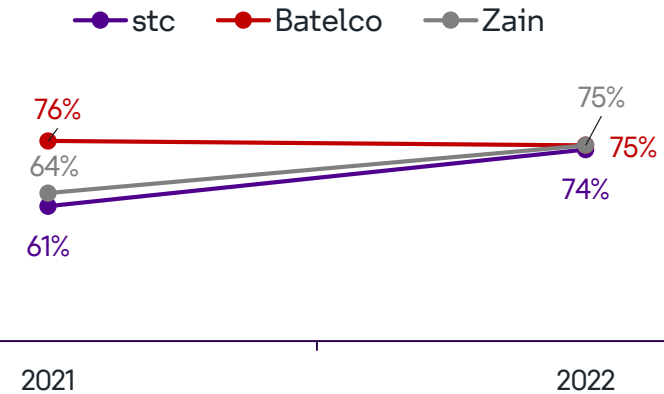


# Summary Home Broadband – NPS & Satisfaction

## NPS



## Satisfaction (T3B)



## stc satisfaction improved, NPS remained largely stable

- stc has shown improvements in terms of Satisfactions, however NPS remained largely stable
- **Network, Internet speed** and **Prices** are the top factors of promoting, detracting and mentioned as areas of improvements for stc

### Reasons of promoting stc

Has good network coverage	42%
It has fast internet	38%
Has good services	16%
Affordable prices	15%

### Reasons of detracting stc

Bad internet connection	54%
Bad network coverage	42%
Charges high costs	16%

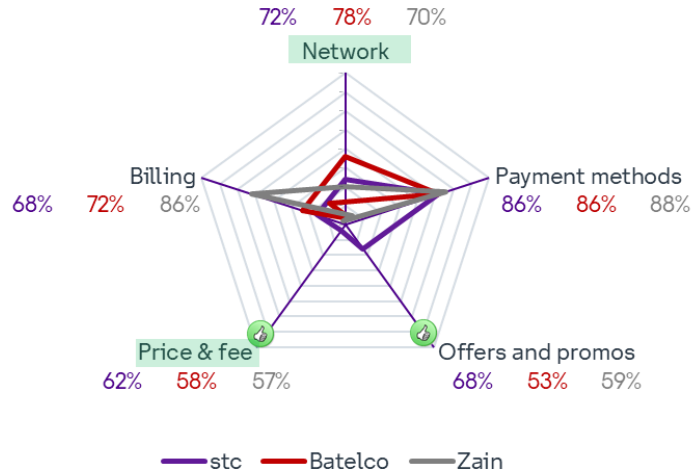
### Suggestions to improve stc

To improve internet speed	40%
To improve network coverage	32%
Lower prices	10%

# Summary Home Broadband – Journey & Touchpoints performance

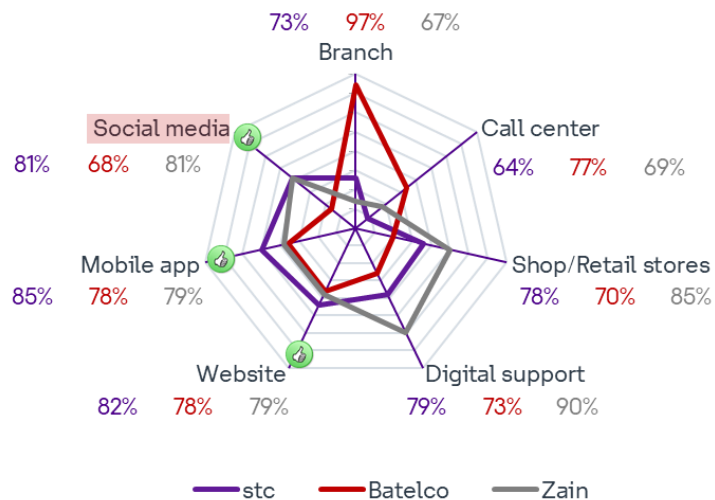
1

## Performance on Customer Journey



2

## Performance on Customer Touchpoints



## Findings

1. In Home broadband category, **Network** and **Price & fee** emerges as most important category attributes where **stc has comparatively low satisfactions on Network**, however secured **relatively higher satisfactions on Price & fee**
2. On Touchpoints, **stc has comparatively low satisfactions on all traditional touchpoints** and performing better than competition on Social media, Mobile application and Website

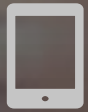
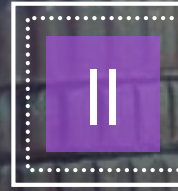
## Way forward

- stc needs to **improve on Network** and **Internet speed** in order to further enhance the satisfaction as well as NPS
- stc needs to improve satisfaction on **traditional touchpoints**.

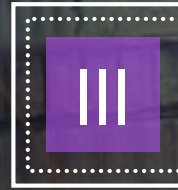




## Study specifics



## Mobile Voice



## Home Broadband



## Mobile Broadband



## Touchpoints Evaluation

01

Net Promoter Score (NPS)

02

Overall Satisfaction

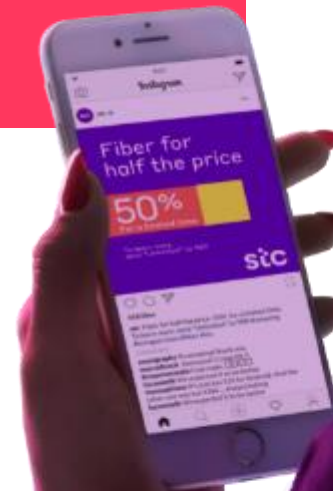
03

Satisfaction Deep Dive

04

Summary & Way Forward

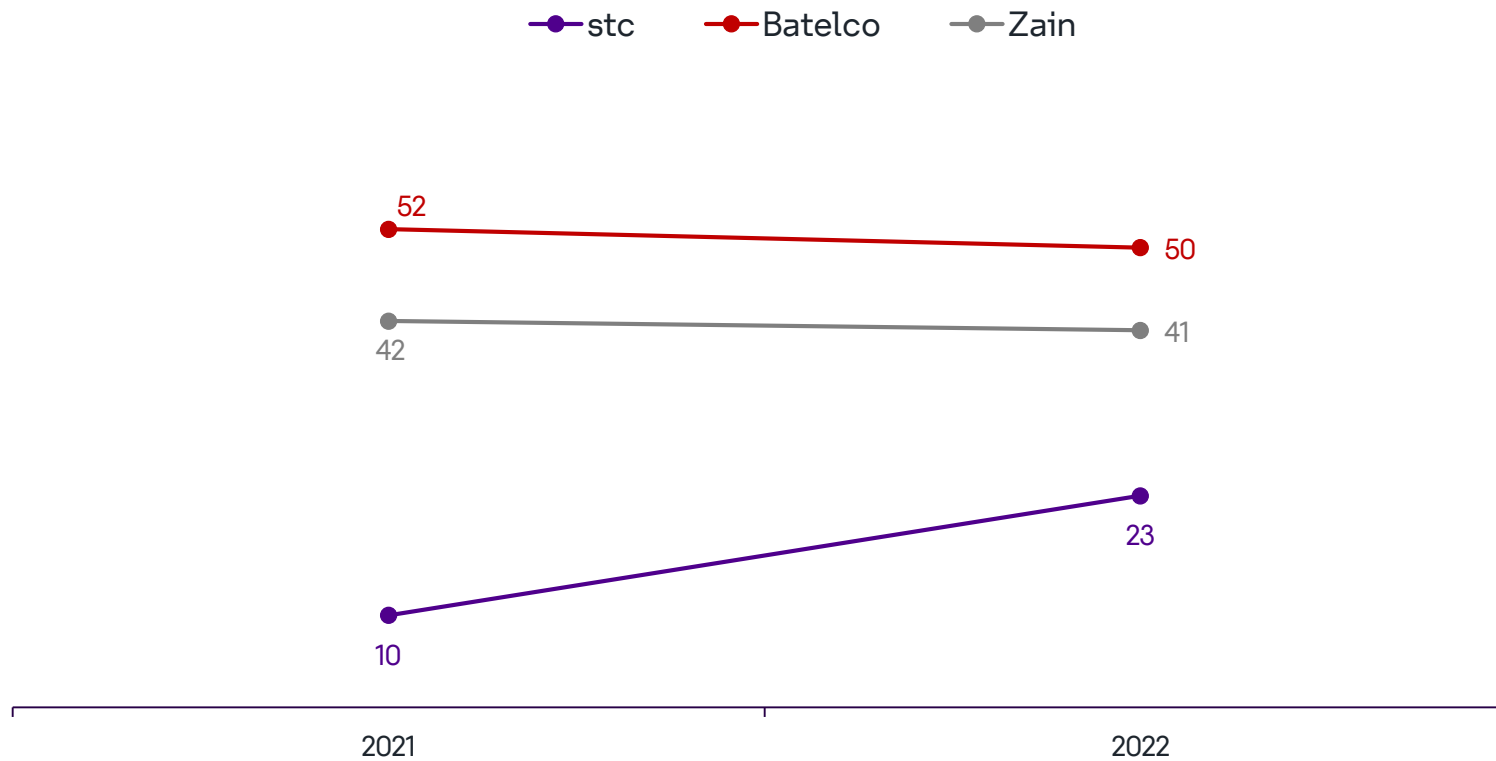
# NPS



stc

stc has improved in terms of NPS  
Both Batelco and Zain remained largely stable

## Mobile Broadband NPS Trends



### Key Insights

- stc NPS has significantly improved in this wave but still holds the third position within the category
- No significant change has been observed for both Batelco and Zain for their NPS

# stc has relatively low NPS amongst Men, 25–34 years old and Northern region

## Mobile Broadband NPS Scores by Demographics – stc

	% of Promoters (9s & 10s)	–	% of Detractors (0 through 6)	=	NPS 2021	NPS 2022
Overall	42%		19%		10	23
Men	39%		25%		4	14
Women	47%		11%		26	36
18-24 Years	49%		7%		-11	42
25-34 Years	33%		26%		12	7
35-39 Years	50%		20%		21	30
40-49 Years	42%		18%		12	24
50+ Years	50%		10%		12	40
Bahraini	42%		22%		1	20
Arab	46%		24%		13	22
Asian/ Others	42%		14%		20	28
Manama	39%		17%		25	22
Northern	32%		29%		-4	3
Southern	49%		15%		15	34
Muharraq	47%		17%		-4	30

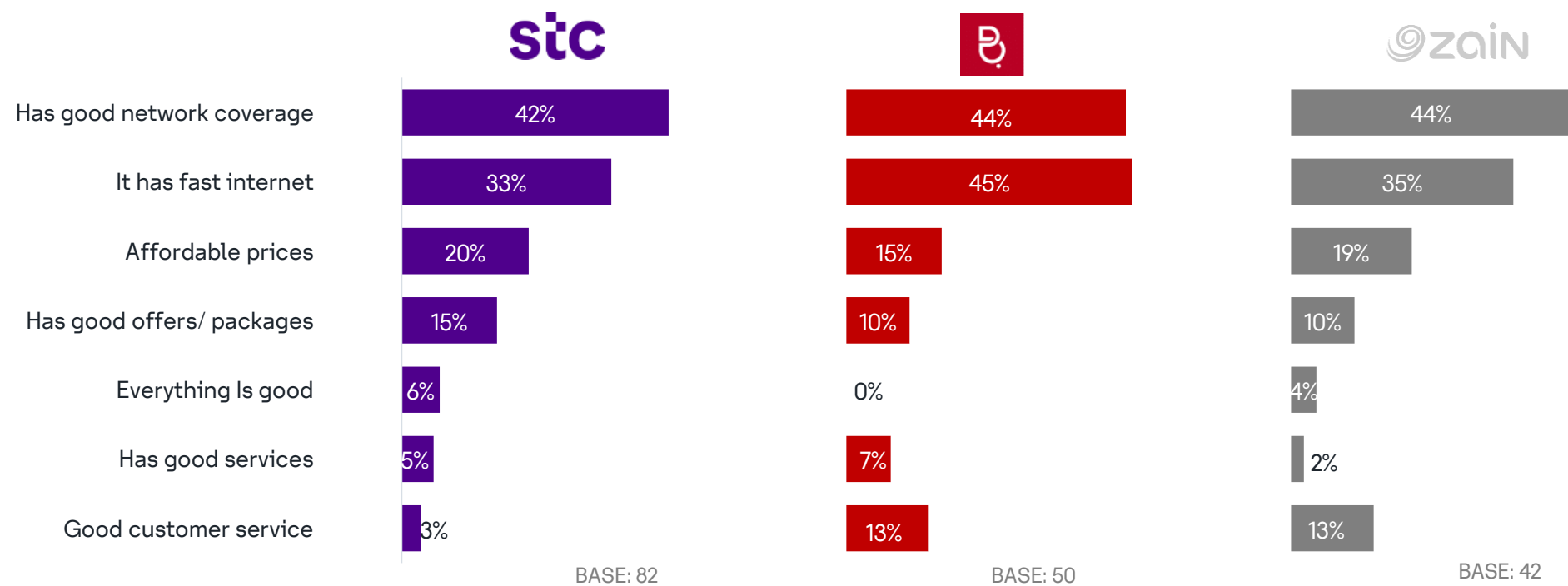
### Key Insights

- As compared 2021, NPS improved across segments except for the age group **25 – 34** and in **Manama** area

# Key reasons for promoting the brand are Network & Internet Speed

## Reasons of Promoting– Mobile broadband

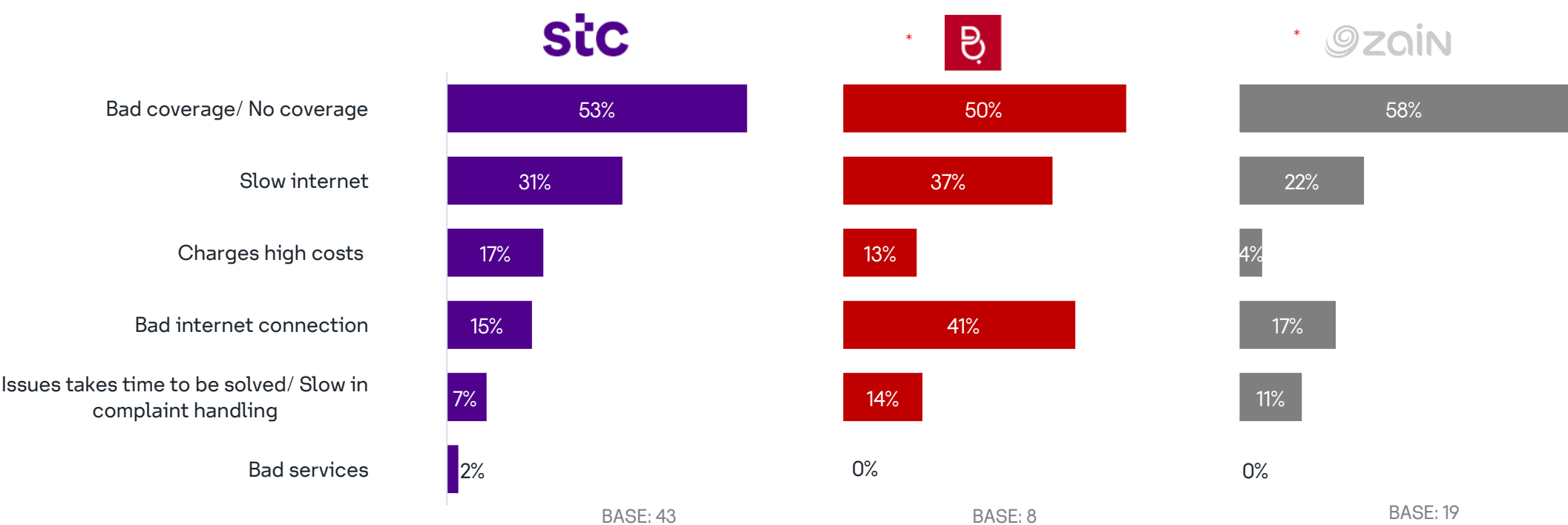
### Promoters



# Amongst detractors Network and Internet Speed remained the top reasons across brands

## Reasons of Detracting– Mobile broadband

### Detractors

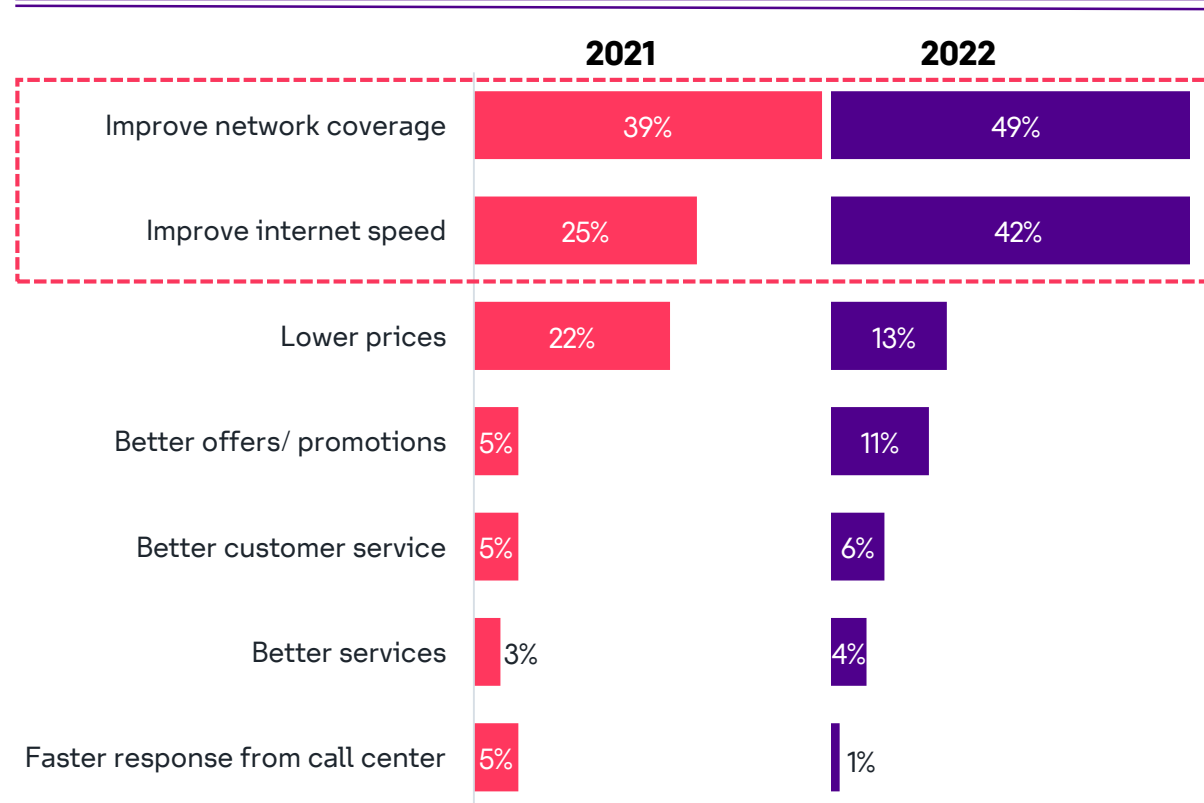


\* Low Base

# stc users are suggesting to improve Network coverage and Internet speed

## Improvements on Mobile Broadband NPS for stc

### Improvement areas for a better NPS

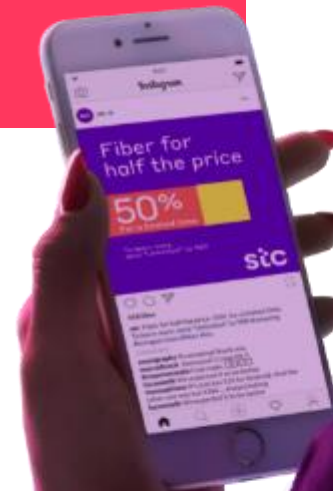


### Key Insights

- Network coverage and Internet speed have higher mentions and increased in this wave



# Overall Satisfaction



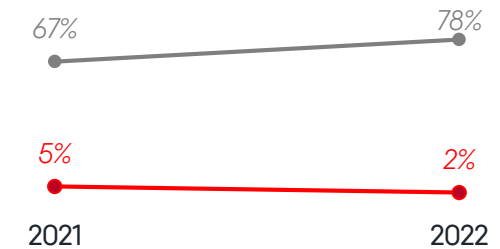
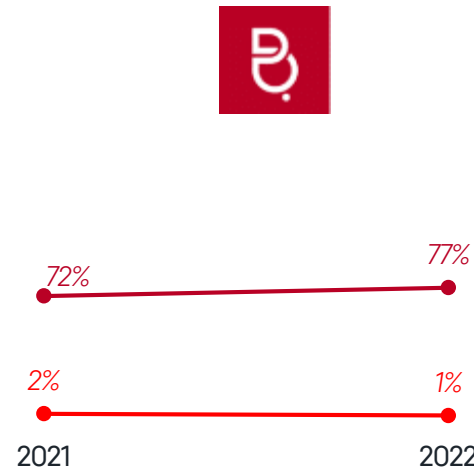
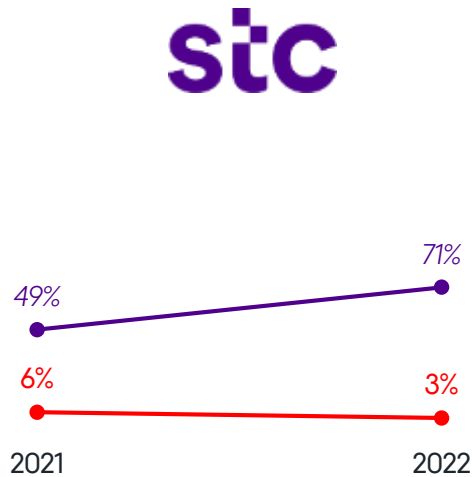
stc has improved significantly in terms of satisfactions, however still lower than the competition

## Overall Satisfaction – Trended

Global & Regional Benchmark  
Score (T3B) **68%**



zain



- stc Mobile broadband satisfactions significantly increased and dissatisfaction are slightly decreased compared to the last year
- Batelco & Zain are highly competing in terms of satisfaction scores

stc has relatively higher satisfactions on Network (An important category attribute) whereas relatively low satisfactions on Price & fee

Service Dimension Satisfaction Scores

	Satisfaction - Top 3 Box ratings	Importance	stc	Batelco	Zain
Journey points	Network	<div><div></div></div> 23	86%	79%	77%
	Payment methods	<div><div></div></div> 5	87%	88%	81%
	Offers and promos	<div><div></div></div> 8	62%	56%	59%
	Price & fee	<div><div></div></div> 16	55%	63%	59%
	Billing	<div><div></div></div> 7	61%	60%	52%
Touchpoints	Branch	<div><div></div></div> 5	65%	92%	86%
	Call center	<div><div></div></div> 9	65%	78%	70%
	Shop/Retail stores	<div><div></div></div> 6	65%	86%	82%
	Digital support	<div><div></div></div> 4	70%	65%	90%
	Website	<div><div></div></div> 7	82%	76%	92%
	Mobile app	<div><div></div></div> 6	78%	83%	87%
	Social media	<div><div></div></div> 4	71%	92%	71%

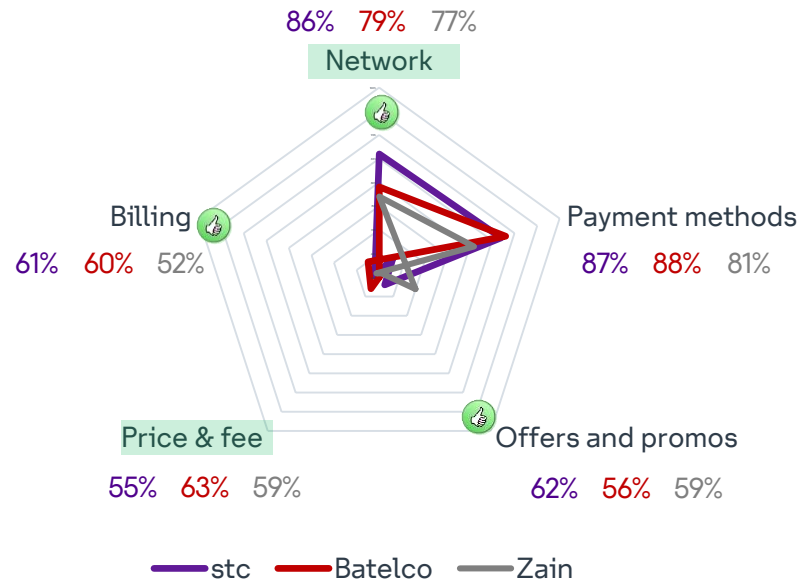
stc Base: 199    Batelco Base: 99    Zain Base: 99



# stc has relatively low satisfactions on Prices & fee and across touchpoints

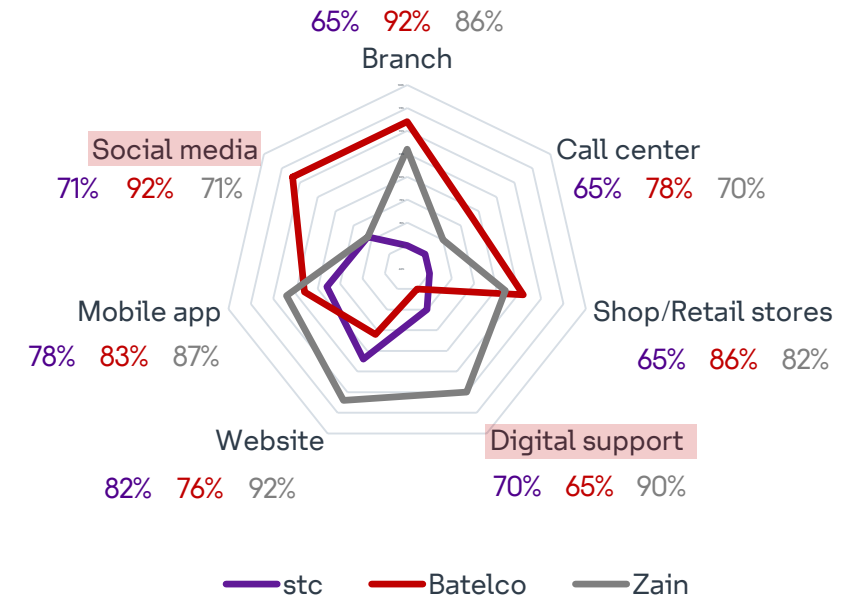
## Satisfaction With Performance Attributes (T3B)

### Journey Related Attributes – T3B Satisfaction



stc is doing better on Network in Mobile Broadband category

### Touchpoints – T3B Satisfaction

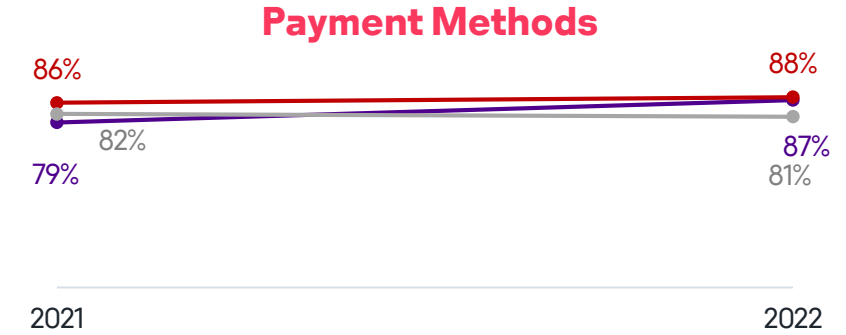
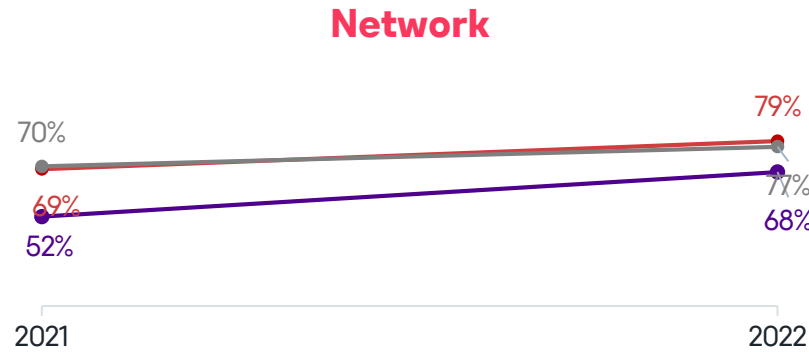


stc requires improvements on majority of touchpoints



Though stc has improved across journey points as compared to last wave, however still behind the competition on Network and Payment methods and Prices & fee

## Service Dimension Satisfaction Scores – Journey Points (T3B)

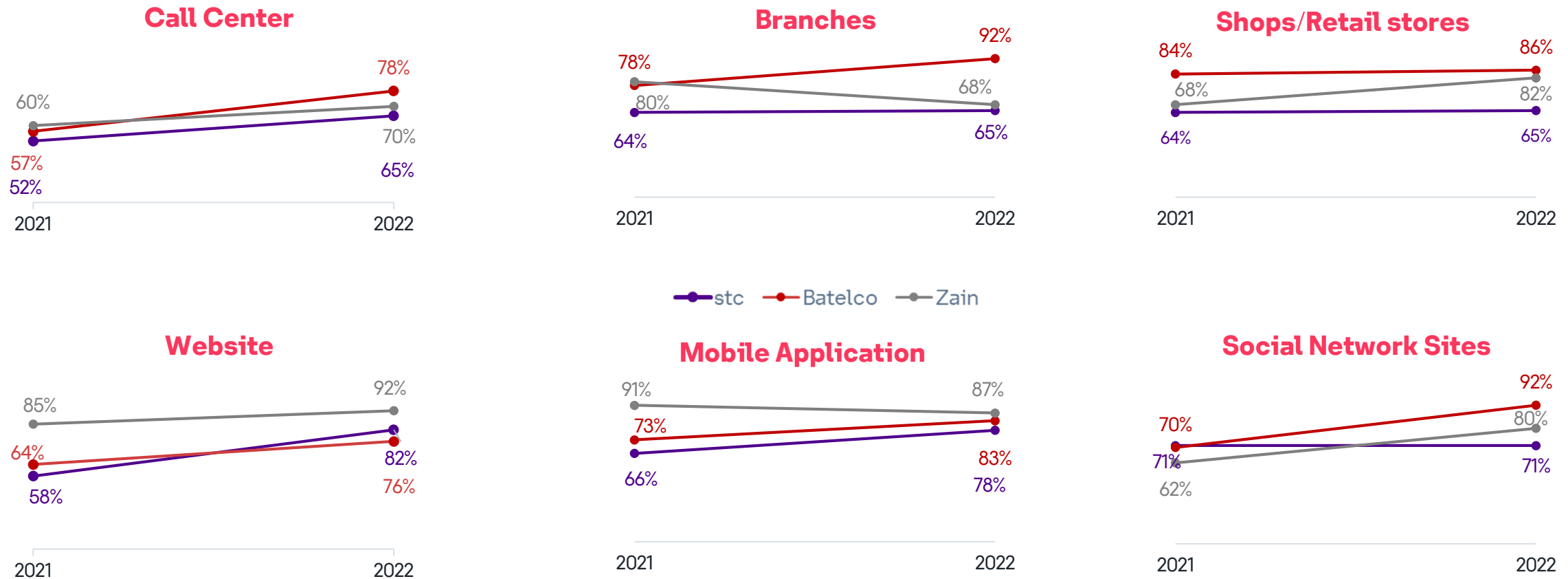


—●— stc —●— Batelco —●— Zain



stc has shown improvements across touchpoints as compared to last year, however still need improvements in order to beat the competition

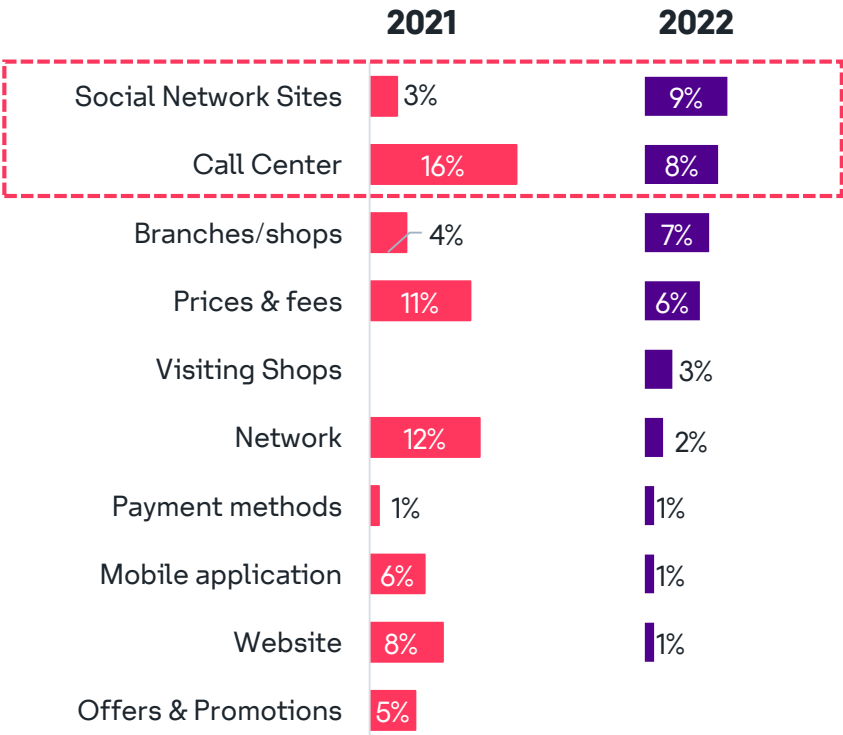
## Service Dimension Satisfaction Scores – Touchpoints (T3B)



# Dissatisfactions for stc dropped for Call center and Prices & fee, however increased for both Social Media and Branches as compared to last wave

## Dissatisfaction - stc

### Dissatisfaction (B3B) – Trended



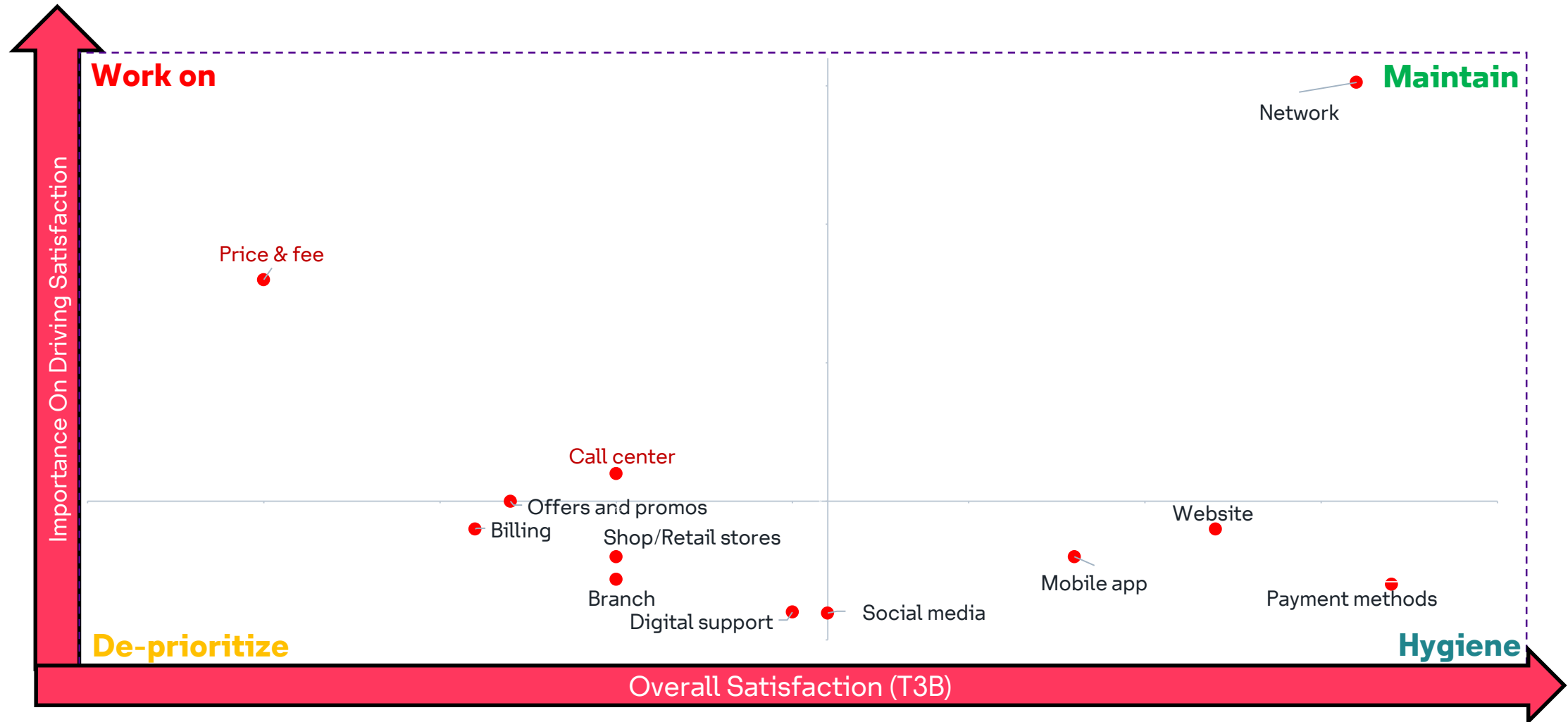
### Key Insights

- Both Call center and Branches need improvements



stc needs improvements on Prices & fee and Call center

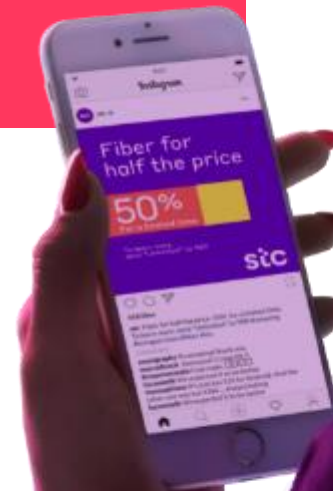
## Quadrant Analysis – stc Mobile Broadband



Base: 199

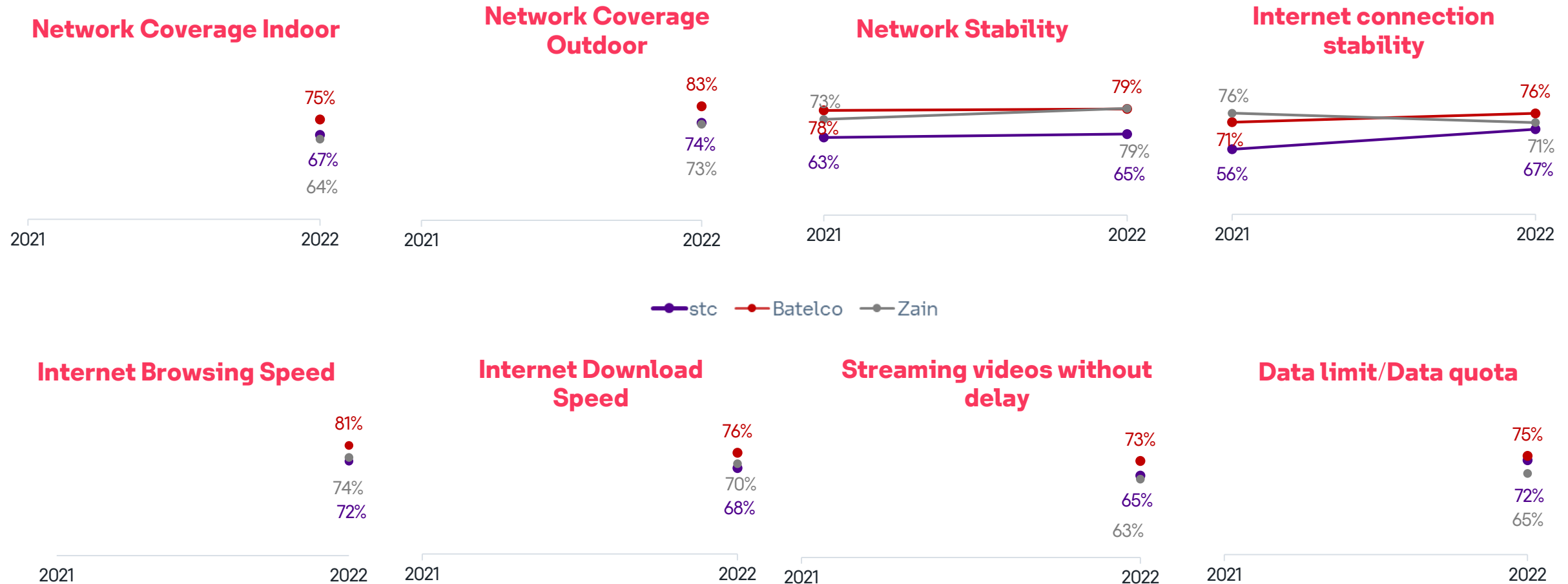
Regarding your experience with your main service provider, can you please let us know how satisfied are you with each of the criterion using a scale of 1-10 where "10 being totally satisfied" and "1 totally not satisfied"?

# Satisfaction Deep Dive



stc is lower then the competition on all the network related sub-attributes

## Satisfaction (T3B) with Network sub-attributes



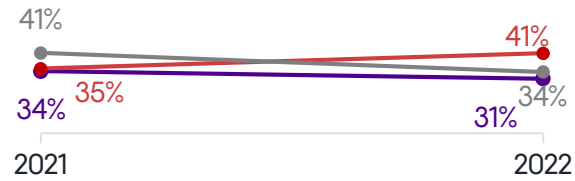
stc Base: 199 Batelco Base: 99 Zain Base: 99

B5. For each of the following criteria regarding the service provider network, I want you to tell me how satisfied are you with each of the criterion using a scale of 1-10 where "10 being totally satisfied" and "1 totally not satisfied"?

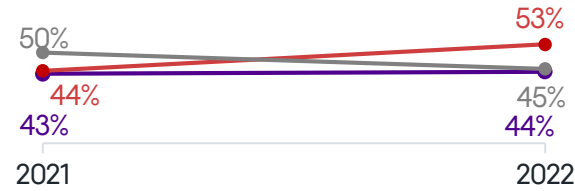
# stc has improved on Price of data bundle

## Satisfaction (T3B) with Prices & Fee sub-attributes

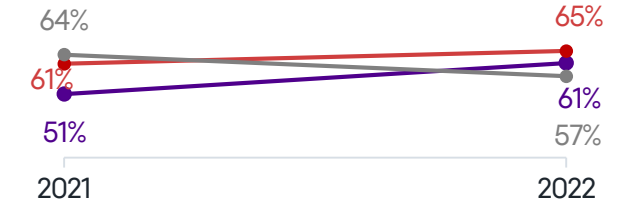
Termination charges of breaking contract



Prices of other value-added services



Price of data bundle

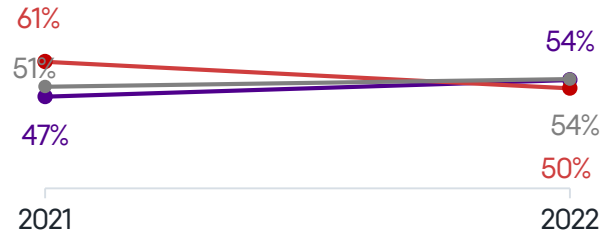


stc Batelco Zain

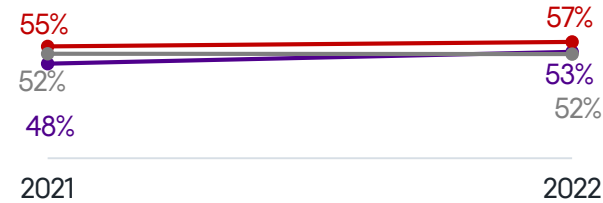
# stc has improved on all parameters of Offers & Promos

## Satisfaction (T3B) with Offers & Promotions sub-attributes

### Variety of offers & promotions



### Constant update of offers & promotions



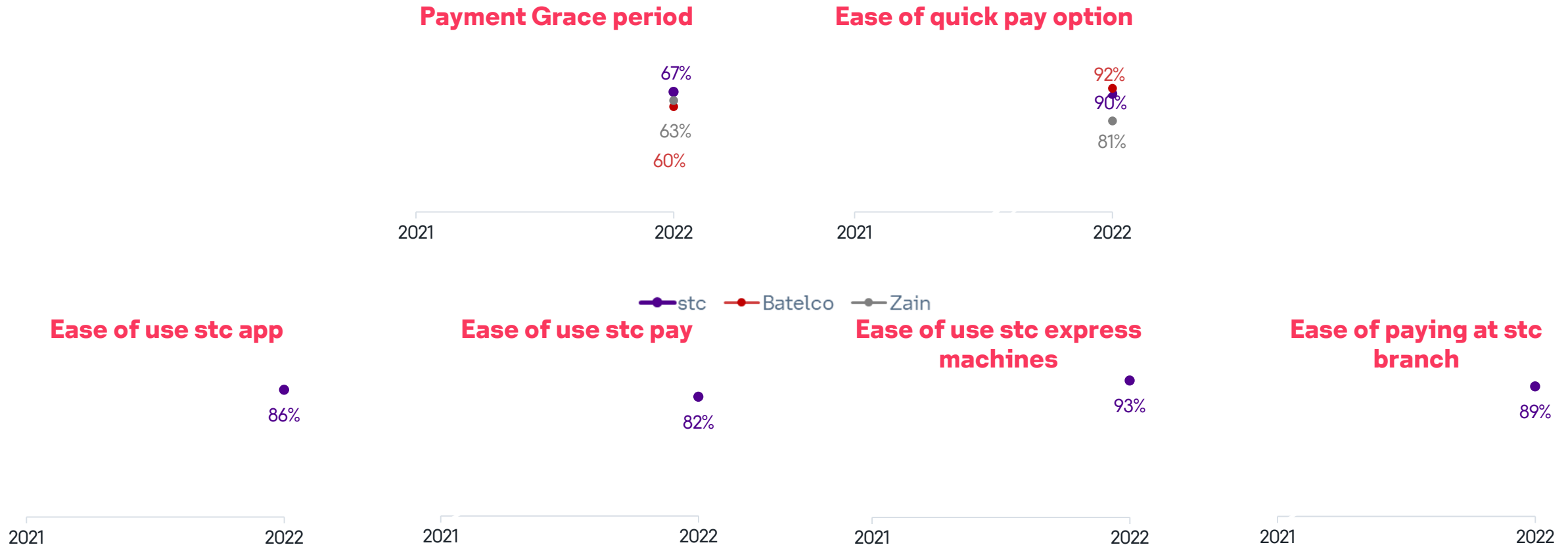
### Suitability of offers & promotions



stc Batelco Zain

stc has highest satisfactions on Payment grace period

## Satisfaction (T3B) Payment Methods sub-attributes



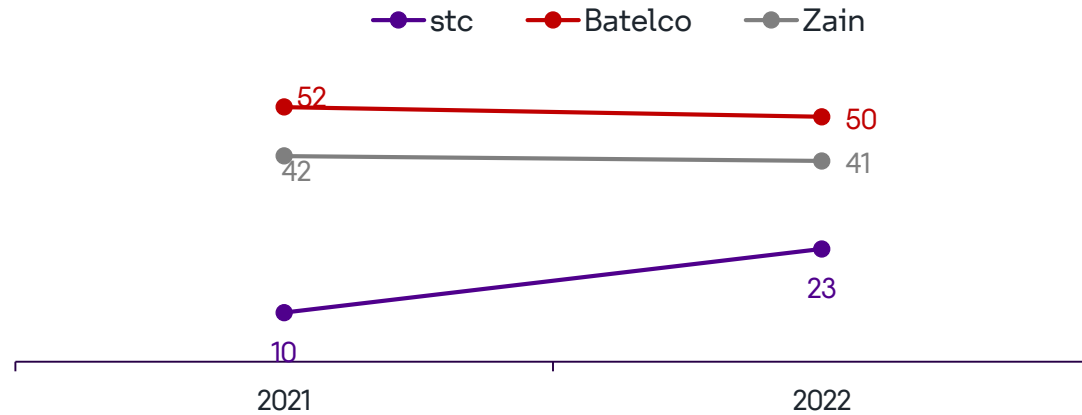
# Summary & Way Forward



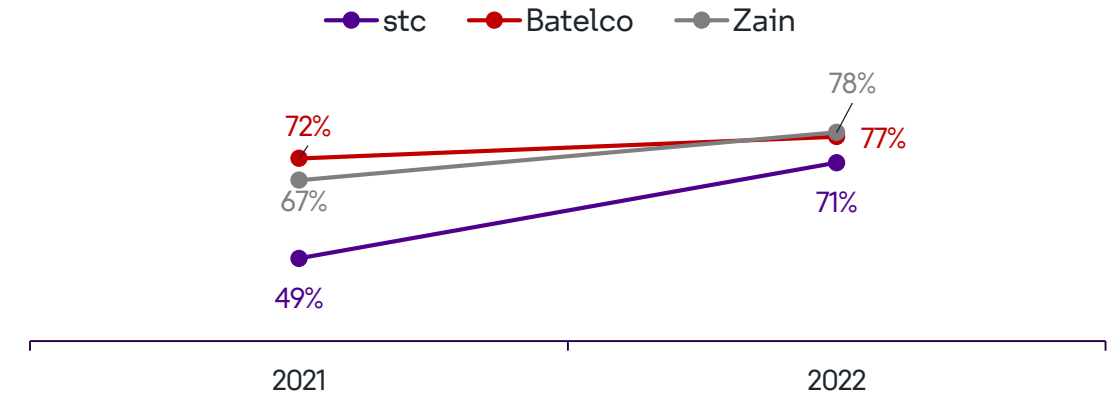


# Summary Mobile Broadband – NPS & Satisfaction

## NPS



## Satisfaction (T3B)



## stc's satisfaction as well as NPS improved significantly in this wave

- Network, Internet speed and Prices** are the top factors of promoting, detracting and mentioned as areas of improvements for stc

### Reasons of promoting stc

Has good network coverage	53%
It has fast internet	33%
Affordable prices	20%
Has good services	16%

### Reasons of detracting stc

Bad coverage/ No coverage	53%
Slow internet	31%
Charges high costs	17%

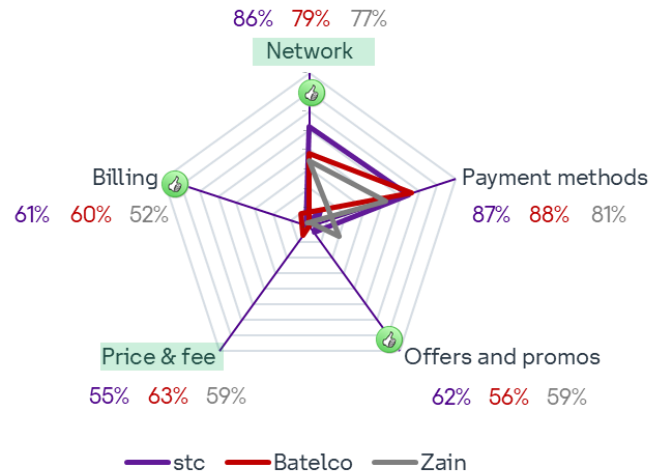
### Suggestions to improve stc

Improve network coverage	49%
Improve internet speed	42%
Lower prices	13%

# Summary Mobile Broadband– Journey & Touchpoints performance

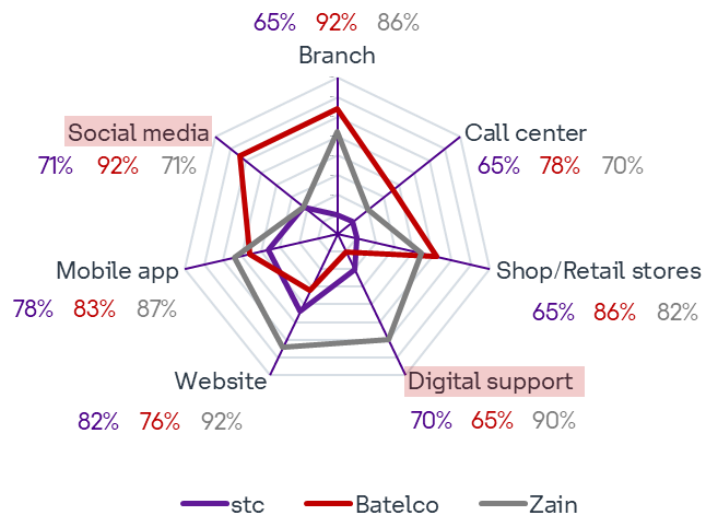
1

## Performance on Customer Journey



2

## Performance on Customer Touchpoints



## Findings

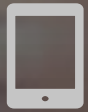
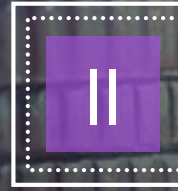
1. In Mobile broadband category, **Network** and **Price & fee** emerges as most important category attributes where **stc has comparatively low satisfactions on Price & Fee**, however secured **higher satisfactions on Network**
2. On Touchpoints, **stc has comparatively low satisfactions on both traditional and digital touchpoints**

## Way forward

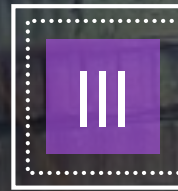
- stc needs to **continue its performance on Network**, However need to **improve on Internet speed** in order to further enhance the satisfaction as well as NPS
- stc must **deliver a very good customer experience** on both Traditional as well as digital touchpoints



## Study specifics



## Mobile Voice



## Home Broadband



## Mobile Broadband



## Touchpoints Evaluation

01 Net Promoter Score (NPS)

02 Overall Satisfaction

03 Satisfaction Deep Dive

04 Summary & Way Forward

# Touchpoints Evaluation



# Call center has higher incidence among stc users and Mobile app among Zain users

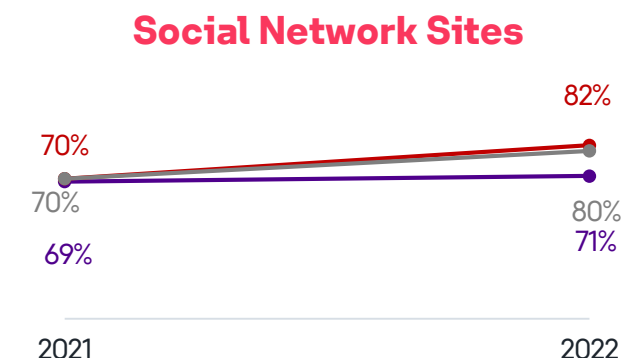
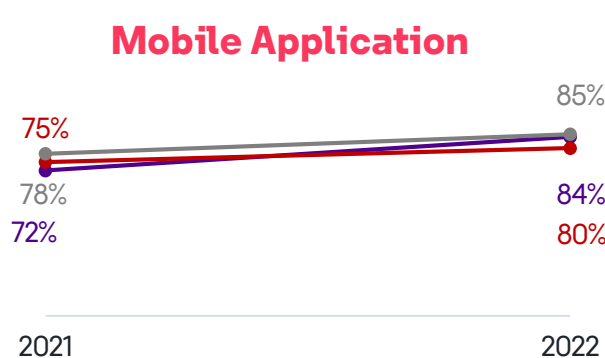
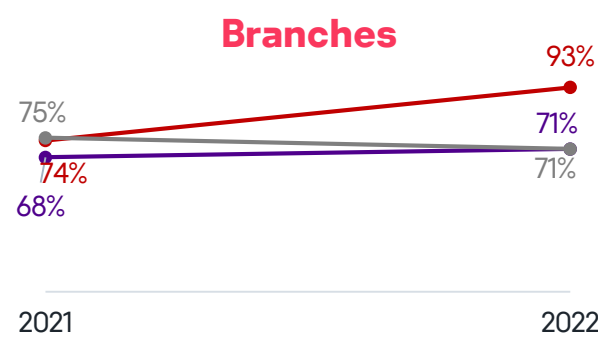
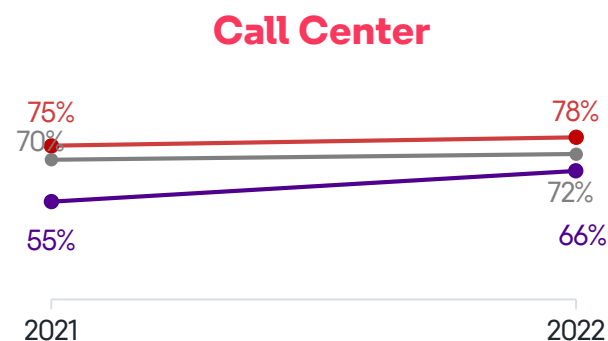
## Mediums Used To Contact Main Service Provider

Medium Used	stc	Batelco	Zain
Call Center	<b>22%</b>	20%	19%
Branches	<b>15%</b>	12%	11%
Visiting shops/ retail outlets/ mobile shops	<b>8%</b>	5%	7%
Mobile App	21%	22%	<b>26%</b>
Website	16%	<b>20%</b>	16%
Social media	10%	<b>13%</b>	12%
Digital support	7%	8%	<b>9%</b>



stc has improved on all the traditional as well as digital touchpoints compared to last wave, however still behind the competition

## Service Dimension Satisfaction Scores – Touch Points (T3B)



— stc — Batelco — Zain



## Deep Dive – Call Center

### Satisfaction (T3B) With different aspects of Call Center



87

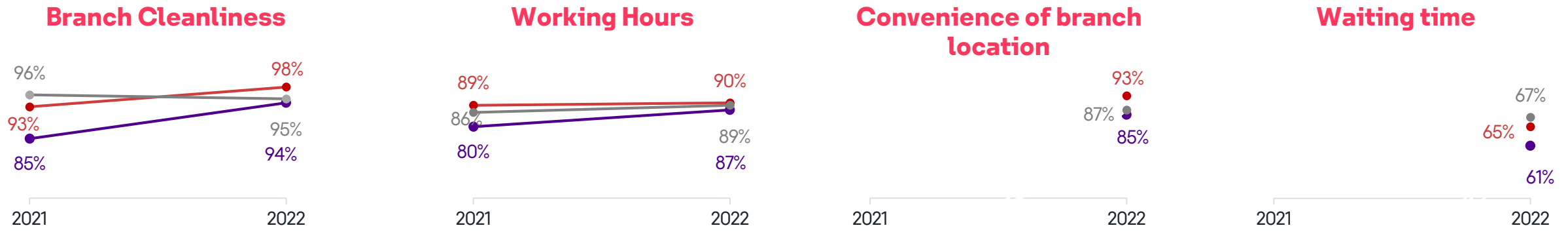


stc is behind the competition on all the branch related attributes

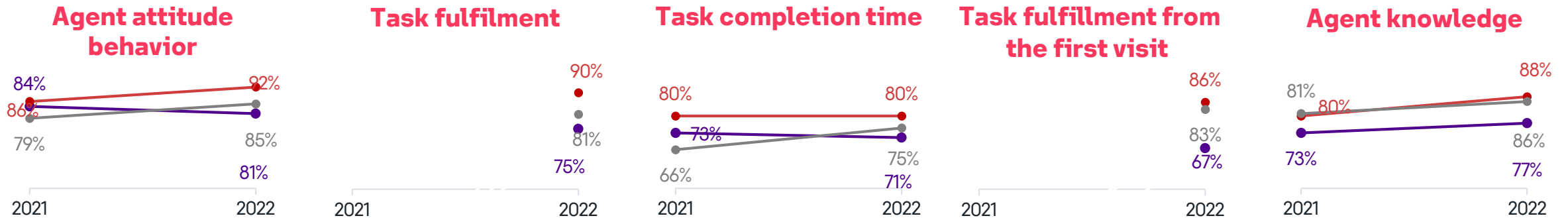
## Deep Dive – Branch

stc Batelco Zain

### Satisfaction (T3B) With different aspects of branch visits

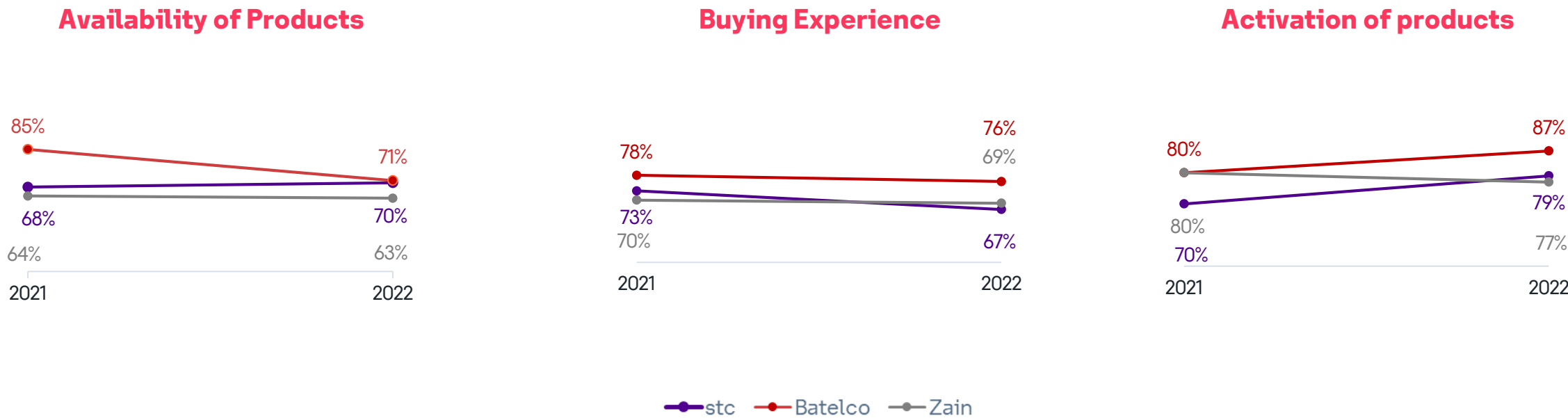


### Satisfaction (T3B) With different aspects of Agent interaction



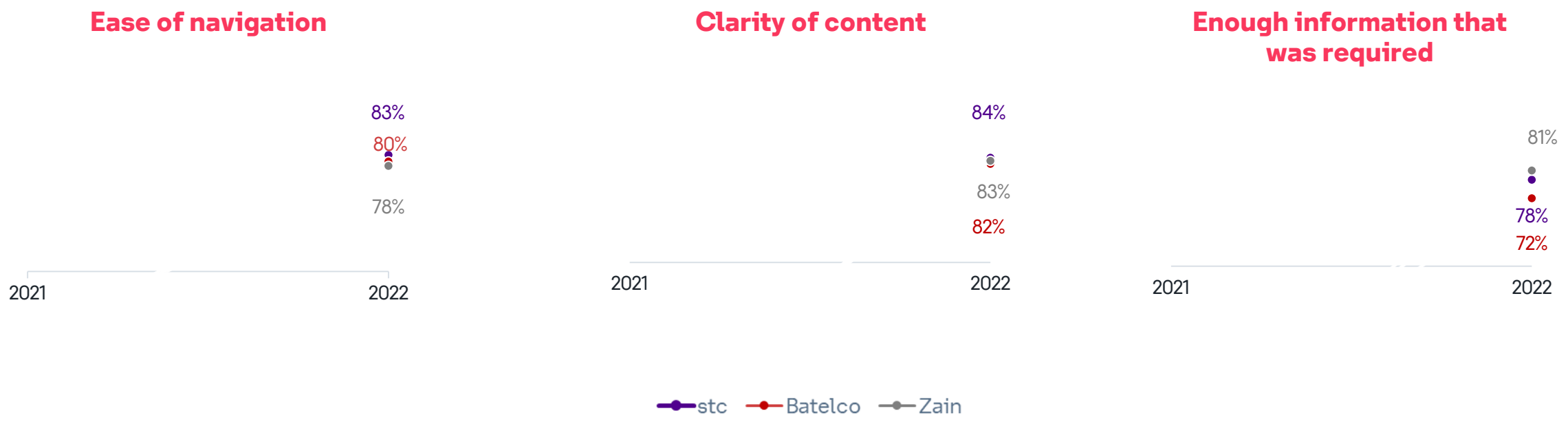
stc has declined on Buying Experience, however needs improvements on all the Retail outlet related attributes

Satisfaction (T3B) With different aspects of retail outlet/ shop visits



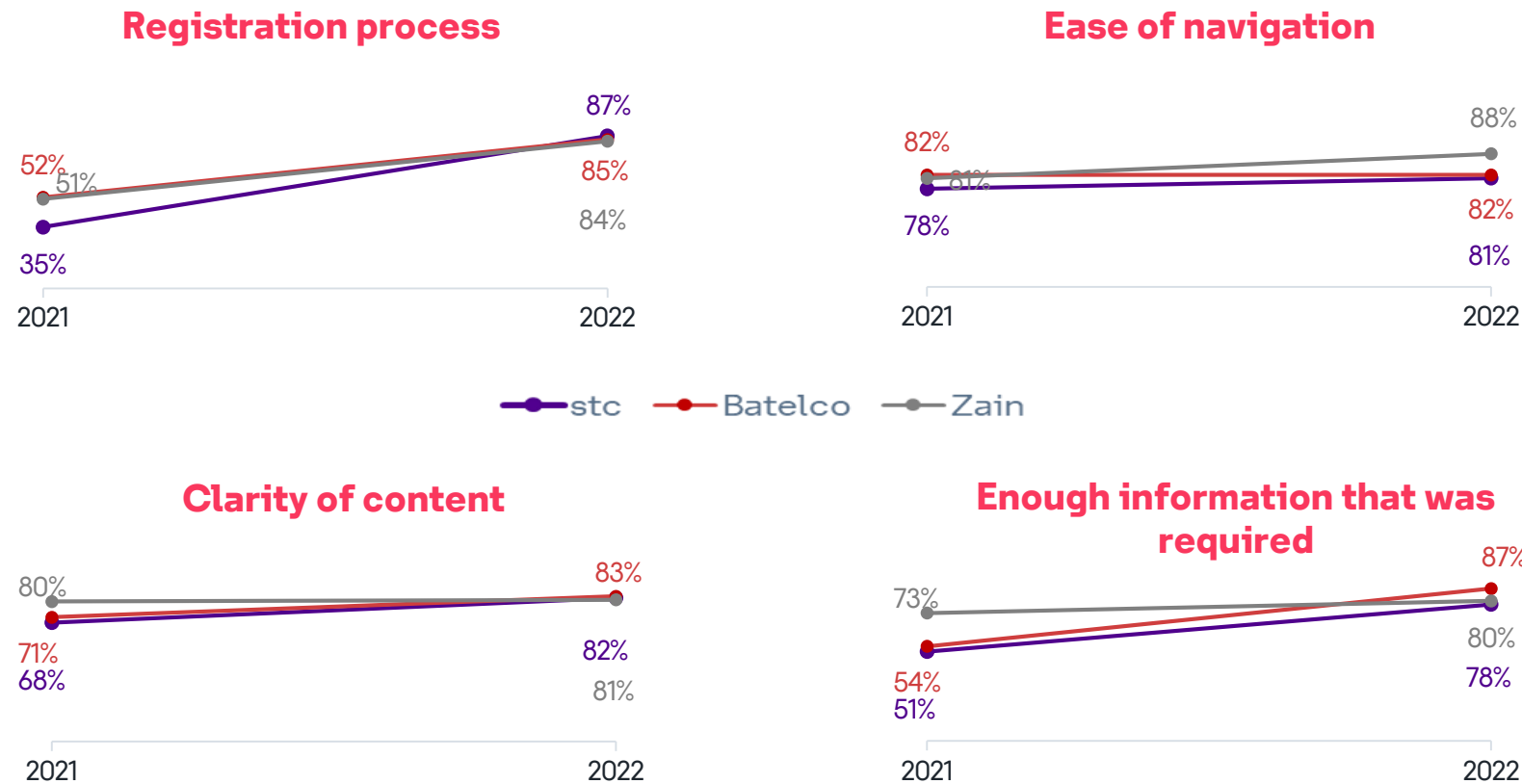
stc has the highest satisfactions on Ease of navigation and Clarity of content, however need improvements on Enough information that was required

Satisfaction (T3B) With different aspects of Website



stc has highest satisfaction on Registration process and almost at parity on Clarity of content, however low satisfactions for Ease of navigation and Enough information that was required

Deep Dive – Mobile Application



At overall level, stc should deliver good customer experience at both Traditional as well as digital touchpoints

Touchpoints Deep Dive – Summary

	Touchpoint	stc	Batelco	Zain	Sub-attributes for stc to improve on
Traditional	Call Center	Third	First	Second	Waiting time to connect agent Ease of reaching agent Time taken for problem resolution Provide solution in first call
	Branches	Second	First	Second	Task fulfilment Task fulfilment from first visit Agent knowledge
	Shops/ retail outlets/ mobile shops	Second	First	First	Buying experience
Digital	Mobile App	Second	Third	First	
	Website	Second	Third	First	
	Social media	Third	First	Second	

# Thank You



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**stc**

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