Survey for Satisfaction Indices for Bahrain E-Government Program

Channel Users Report (Survey III)

Submitted to:
eGovernment Authority
Kingdom of Bahrain

Kingdom of Bahrain
eGovernment Authority

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nielsen

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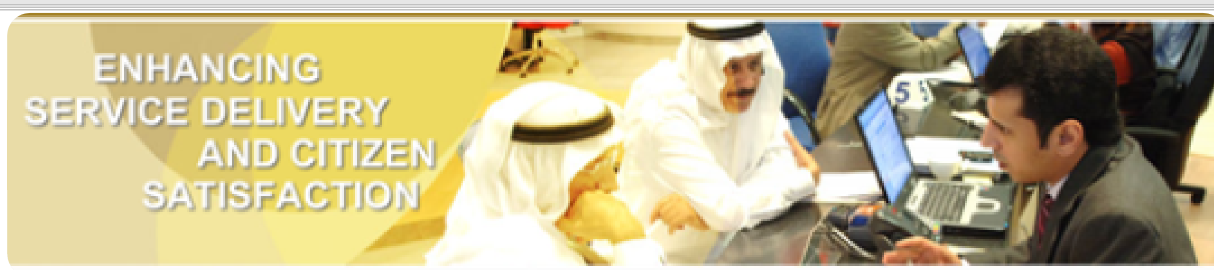
eGovernment is focused on ensuring the effective delivery of government services to citizens, residents, businesses and visitors (collectively, our customers). Our target is to be the leader in eGovernment in the GCC and at least 5th best in Asia by 2010.

The Strategy has set a target to achieve an 80% customer satisfaction rate by 2010.

As stipulated by the strategy, the eGovernment Authority will offer 200 basic government services to the public through 4 channels – eGovernment National Portal, Mobile Portal, Common Service Centers and the National Call Center. To date, 90 eServices are available through the National Portal (www.bahrain.bh) with the rest set to launch at various stages until the end of 2010.



EXECUTIVE SUMMARY

(All CHANNEL USERS)

About the study

The basic aim of the study was to develop a system for measuring the status of development of e-government from the perspective of the users (real and potential) and to establish their level of satisfaction, needs and requirement by employing such a system of measurement.
Thus the objectives of the study were to:

- establish the level of awareness of services offered by e-government,
- establish the extent of use of e-government services and the reasons for its non-use,
- establish the level of satisfaction with the current way of supplying information and e-government services,
- identify the key area which will promote better awareness and usage of services in future

The findings of the study in this report are based on the feedback obtained from the e channel users who have attempted to evaluate the implementation of e initiative of Bahrain government from their perspective.

The **Other Objectives** of the Research were
- Provide satisfaction details for the main services used and prioritize action plan.
- Assess the awareness and penetration levels of the e-government services among the different categories to achieve communication objectives
- Assess the different parameters which will contribute for the calculation of the satisfaction index and the transformation index

Research Methodology

Stakeholder assessment was the staring point of the project. This process was done to understand the components of Customer Satisfaction Index and Government Transformation Index. Brain storming sessions and discussions with eGovernment authority's internal stakeholders gave inputs in finalizing the questionnaire and the parameters to be measured.

Telephonic interviews were conducted among channel users using a structured questionnaire.

Sampling and Sample Distribution

As per the design of the study the survey among channel users will be conducted 4 times in two years (2009-2010). Users of the following channels are proposed to be surveyed during different rounds of the survey

- Portal /Internet
- Mobile portal /mobile gateway
- Toll free contact number /call centre
- Kiosks/common service centre

During survey I, the study was conducted only among portal/internet and toll free contact number users since Common service centers (CSC) and Mobile portal were not launched.

All the channel user respondents were selected from the channel user's database provided by eGovernment Authority (EGA). Respondents who agreed to participate in the survey were interviewed. Hence, the sample selected for this target segment was not based on quota set by various demographic profile.

A total of 1101 interviews among the 4 types of channel users were conducted during wave 2 (Dec 2009). Out of the total sample, 450 interviews among internet users, 201 among mobile users and 250 among toll free call centre users and 200 interviews among common service center were conducted.

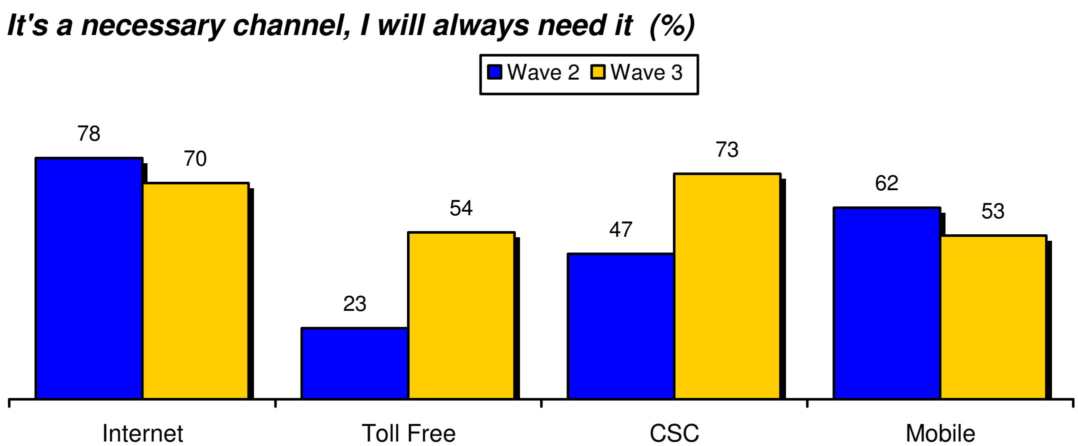
During wave 3 (April-May 2010) a total of 1018 interviews were conducted. Out of the total sample, 367 interviews among internet users, 201 among mobile users and 250 among toll free call centre users and 200 interviews among common service center were conducted.

The interviews were conducted in English and Arabic using telephonic method.

FINDINGS

National web portal and Common Service Centers (CSC) emerged as the most important channels among the all respondents interviewed. The findings show that 7 out of 10 respondents reported web portal and CSC as "necessary channel". About half of the respondents preferred Toll Free and Mobile channel as "necessary channel". It is interesting to see that CSCs have emerged more important than other channels among the channel users.

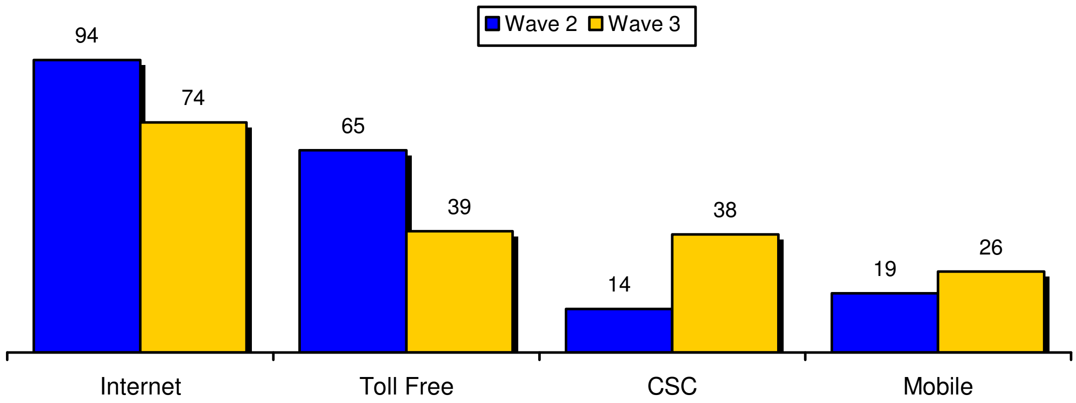
Ranking of CSC and Toll Free as 'necessary channel' has increased significantly from the previous wave where as preference for mobile channel has dropped slightly (62% to 53%) during wave 3.



Wave 2: All respondents (Internet-450, Mobile-201, Toll Free-250, CSC-200)
Wave 3: All respondents (Internet-367, Mobile-202, Toll Free-250, CSC-200)

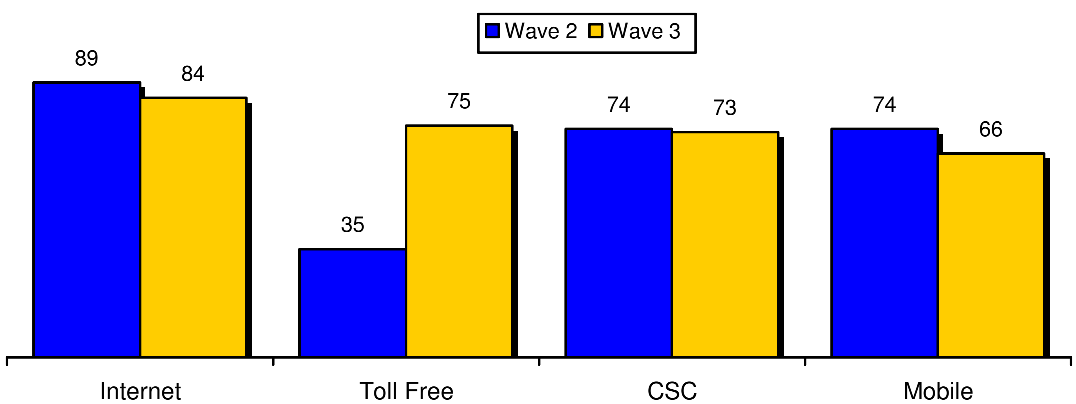
During wave 2 **web portal** and **toll free** were emerged as **1st** and **2nd** priority channels respectively in terms ease and convenience. During wave 3 web portal continues to occupy the first place as priority channel however, along with toll free number CSCs too occupy second place as priority channel. This can be further corroborated by the data which shows that in terms of ease and convenience **toll free** ranking has dropped significantly while the ranking of **CSC** (common service center) has increased significantly.

Those who gave Top 2 ranks in terms of ease and convenience (%)



In response to the channels to be used in future, in the previous wave, more than 70% respondents mentioned that they will **definitely use** web portal, mobile portal and CSC. In the previous only 35% respondents mentioned that they will **definitely use** the toll free number. Interestingly this percentage has increased to 75% during wave 3 where as Mobile channel willingness to use has shown a slight decline from 74% to 66% during wave 3.

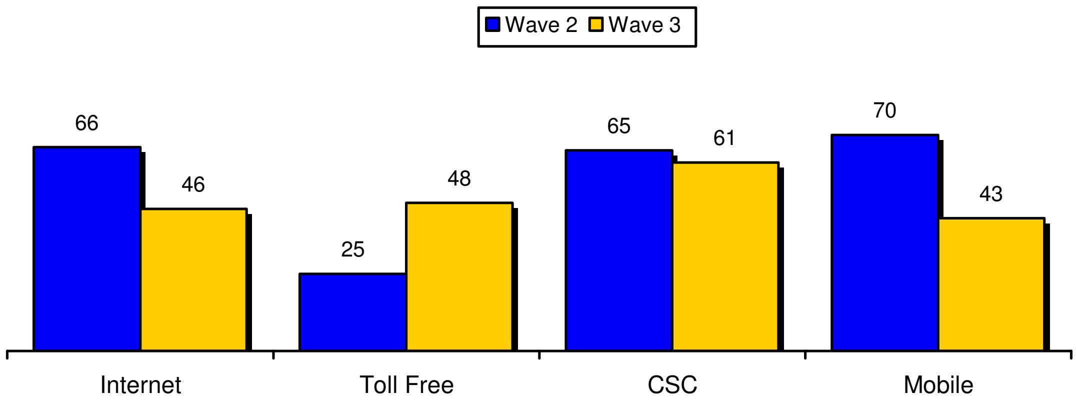
Will definitely use (%)



Wave 2: All respondents (Internet-450, Mobile-201, Toll Free-250, CSC-200)
Wave 3: All respondents (Internet-367, Mobile-202, Toll Free-250, CSC-200)
(Multiple Response)

Further, it is noticed that CSCs have taken over other channels with 61% respondents expressing complete satisfaction with this channel vis a vis others. Other three channels internet, toll free and mobile got relatively low top box score . There is significant drop in the scores of Internet and Mobile channels when compare with previous wave (2).

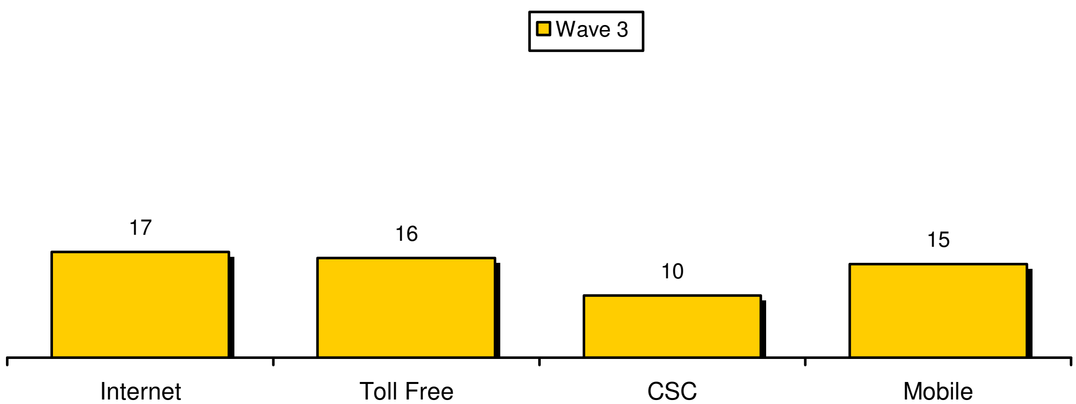
Extremely satisfied (%)



Wave 2: All respondents (Internet-450, Mobile-201, Toll Free-250, CSC-200)
Wave 3: All respondents (Internet-367, Mobile-202, Toll Free-250, CSC-200)

When asked about if faced any problems with these channels. Very few respondents reported of encountering any problems (<17%).

'Yes" faced the problem (%)



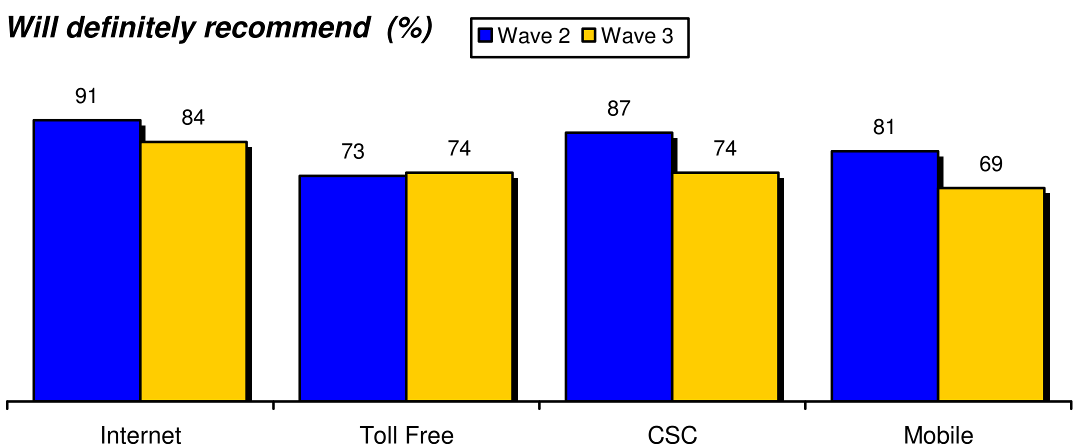
** All those who used e service through respective channels*

Although the percentage of respondents reporting problems was low, the most common problems identified for web portal as well as mobile portal, was 'slow website' and 'difficult to access'. Problems mentioned by toll free users were 'waiting a long time to contact the call center agent', 'not providing the appointment services' and 'inability of solving problems'. Problems mentioned by CSC users included slow process and network problems and issues related to availability of limited staff and less knowledgeable staff.

A few respondents provided suggestion for further improvement /giving additional services, such as to include bill payment facilities for (mobile, passport renewal, electricity, violation etc) on mobile portal , provide information about services (for tourists, useful numbers, bus routes, museum, rules and regulations, housing etc).

For CSC, respondents feel that these centers lack staff, space, chairs, and machines. Besides, they also feel that more CSC branches should be opened and made operational.

Overall about three fourth of respondents expressed that they will definitely recommend different channel to others. Comparison with wave 2 data shows that percentage of respondents who would definitely recommend has dropped for almost all channels.



Wave 2: All respondents (Internet-450, Mobile-201, Toll Free-250, CSC-200)
Wave 3: All respondents (Internet-367, Mobile-202, Toll Free-250, CSC-200)

1.0 Background

To enhance the productivity and efficiency of the Government, **Kingdom of Bahrain** commenced usage of Information and communication technology at the inter ministerial level and to its customers – Residents, Citizens and Business.

The e-government authority of Bahrain started the activity based on a strategic vision of facilitating the usage of services for the key stakeholders dealing with different government entities. The initiative has different strategic objectives –

- Becoming the leader in e-government in the GCC and rank as 5th best in Asia by 2010.
- Increase the usage of the e-government services among all the stakeholders
- Increase the awareness level of the e-government services
- Provide a world-class quality *services to encourage consistent usage*

The e-government of Bahrain is conscious that one of the crucial needs to ensure growth of usage is the satisfaction with its performance among the current users. The Nielsen vision is completely aligned with this strategic pillar, and was thus, entrusted to conduct a customer satisfaction tracking study across key stakeholders such as

- Residents
- Business customers
- Government Employees
- Channel users (Government Portal and Call center, CSC and Mobile)

1.1 Research Objectives

The study evaluates awareness, usage and expectations for the various e-services offered. It aims to calculate a satisfaction index for e-government services among the key stakeholders – business, residents and government employees; as also a transformation index for the government services based on the experience of the key stakeholders. It further aims

- to provide satisfaction details for the main services used;
- assess the awareness and penetration levels from the perspective of communication objectives, and
- measure the importance of different services to customers.

This document details the findings of the survey carried out among Government Portal Users, Mobile Portal users, Toll Free Users and Users of CSC (Common Service Center) in the Kingdom of Bahrain.

The subsequent pages contain the methodology, study design, information gathering process and the findings of the survey results.

2.0 Methodology

2.1 Research Design

As per the design of the study the survey among channel users will be conducted 4 times in two years (2009-2010). Users of the following channels are to be contacted during different rounds survey

- Portal /Internet
- Mobile portal /mobile gateway
- Toll free contact number /call centre
- Kiosks/common service centre

During survey I, the survey has been conducted only among portal/internet and toll free contact number users since CSCs and mobile portal were not launched.

To understand the experience of the channels users and to arrive at evaluation parameters very brief (in depth interviews) qualitative was undertaken prior to launch of quantitative phase.

The respondents were randomly selected from the channel user's database provided by eGovernment Authority (EGA).

2.2 Target Respondents

Respondents interviewed for the survey were from general population across socio-economic classes, genders and nationalities, who were more than 15 years old. There was no quota fixed for this respondent segment. Respondents who were willing to participate in the survey were interviewed. Telephonic Interviews were conducted as per respondent's convenience.

2.3 Research Instrument

Interviews were conducted using a structured questionnaire. The questionnaire was translated into Arabic. Interviews were done in Arabic / English as convenient to the respondent.

- The questionnaires were a mix of close and open-ended questions.
- The duration of the interviews was around 10-15 minutes.

2.4 Quality Control

Rigorous quality controls were followed at both the field and data processing levels.

Daily back checks on the interviews conducted were done to ensure accurateness of the data.

Survey for Satisfaction Indices for Bahrain eGovernment Program

Findings -Channel Report

eGovernement Portal usage-related statistics*

- 17,523,244 visitors (Since the launch of the eGovernment Portal)
- 120,109 financial transactions conducted via the site totaling BD 7,771,037
- Average time spent, 6 minutes
- Number of viewed pages in the last month: 666,003 pages
- More than 100 vital eServices online
- Credit & debit card payment facility

*** (Updated monthly - last update 30/09/09)**
Source: http://www.ega.gov.bh/en/vitalstatistics.php

1.0 Interface with the portal and experience

This section of the report details out the interaction and experience of population in Bahrain who visited the government portal to avail one or more e services. This includes, reasons for visiting the portal, look and feel, type of service used, satisfaction with various attributes of this channel and lastly users suggestions and expectations.

Summary findings and next steps

Findings across all stakeholders show that the government portal is widely used and is seen as an efficient channel since it saves time and offer convenience to it its users. The data indicate that the usage of e-government services through the internet portal is relatively high amongst men as compared to women. Users primarily belong to the working population, between the age group 26-50. The resident data too supports this finding. The portal was primarily used to avail specific service and for general information and queries.

About half of all channel users (out of 1019 respondents), ranked web portal as most preferred channels in terms of 'Ease of usage and convenience'. During previous wave proportion was around almost three forth. This indicates a shift of channel preference from web portal to other channels. Despite this almost all respondents expressed satisfaction and reported the intention to use web portal in future. Further the score on 'Extremely Satisfied' has declined significantly in the recent wave (from 66% in wave 2 to 46%). Overall portal users expressed positive experience while transacting on the portal. The results were consistent when compare and wave 2. However, in wave 3 scores on all attributes have declined marginally. Despite of the decline all scores are close to 90%. As far as the technical factors are concerned, compare to past 2 waves, similar declined is evident in wave 3. The decline is on attributes related to slow service, page looked cluttered and finding the contents/information easily. About 17% respondents expressed that they encountered problems while using the portal. The main problems identified related to slow speed and accessing issues.

About 25% of respondents who offered to give suggestions, reflected the need for more services to be included in the portal, the additional services required by the respondents include Bill payment facilities (mobile, passport renewal, electricity, violation etc), Information about services (for tourists, useful numbers, bus routes, museum, rules and regulations, housing etc) and all ministries services should be electronically available in the portal.

During wave 3, almost half (55%) of respondents reported that they visited the portal for getting the general information, which is a significant increase compare to the last two waves. The type of transactions include 'pay electricity and water bill', 'smart Card appointment' and 'pay traffic contravention'. Finding the portal address and navigation through the webpage was rated as 'very easy' by almost all users.

The average length of transaction from the time the respondents logged in is about 9 minutes. Majority (82%) respondents expressed that it took around 1 min to open the page (EGA web portal).

Detailed Findings

1.1 Respondents' Profile

During wave 2I, 367 portal users were contacted from database provided by EGA. Out of the total contacts made 87% males and 13% of female users agreed to participate in the survey. Across the three waves, three fourth of the respondents were above 35 years of age. Male, female ratio is similar in wave 2 and wave 2I.

Exhibit 1.1 Distribution of Respondents across Age groups (Portal users)

		Wave 2	Wave 3
Base: All	*400*	*450*	*367*
19-25 Yrs	2%	8%	8%
26-35 Yrs	24%	18%	16%
36-45 Yrs	34%	38%	29%
46-55 Yrs	27%	34%	42%
55 Yrs+	13%	1%	4%

Base: All Respondents

Exhibit 1.2 Distribution of Respondents across Age groups (Portal users)

		Wave 2	Wave 3
Base: All	*400*	*450*	*367*
Male	94%	88%	87%
Female	6%	12%	13%

1.2 Importance of Portal

Importance of web portal seems to have slight decreased as compared to and wave 2. However, almost majority respondents have expressed positive attitude towards the portal and mentioned that they would use the portal in future.

Exhibit 1.3 Importance of portal

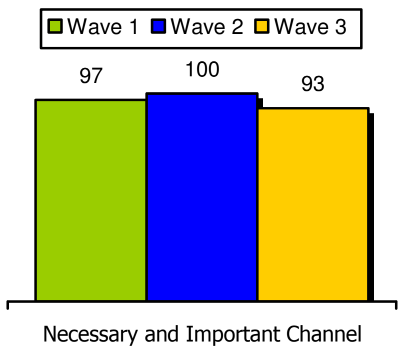
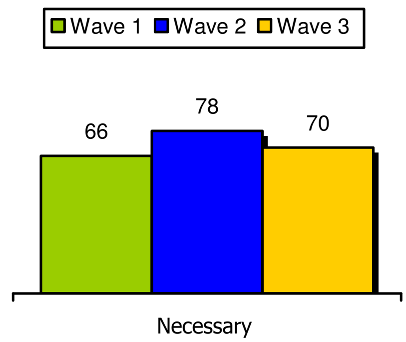
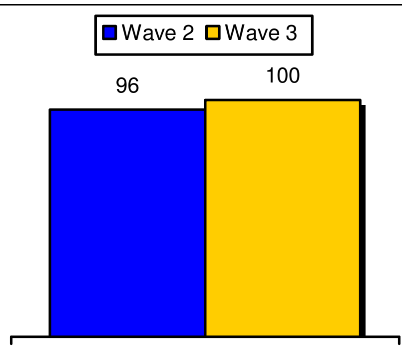
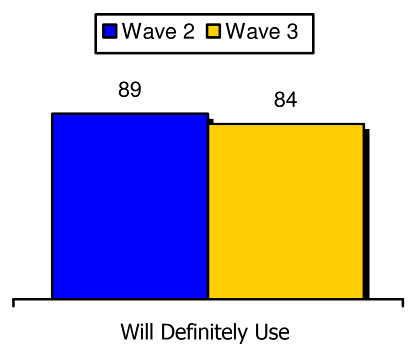
Top 2 Box (Necessary /Important)	Top Box (Necessary)
	
Base: All Respondents (w1-400) (w2-450) (w3-367)	

Exhibit 1.4 Future intention to use.

Top 2 Box (Definitely/Might Use)	Top Box (Definitely Use)
	
Base: All Respondents (w2-450) (w3-367)	

1.3 Reason for Visiting the Portal

The data shows that the main reasons of visiting the portal were, 1) to make a transaction and 2) to get general information and queries. During wave 3, almost half (55%) of respondents reported that they visited the portal for getting the general information, which is a significant increase compared to the last two waves. The type of transactions include 'pay electricity and water bill', 'smart Card appointment' and 'pay traffic contravention'.

Exhibit 1.5 Purpose for Visiting the Website

		Wave 2	**Wave 3**
Base: All	*400*	*450*	*367*
Make a transaction	18%	84%	80%
General information and queries	33%	34%	55%

Base: All Respondents (Multiple Response)

Exhibit 1.6 Type of transaction made

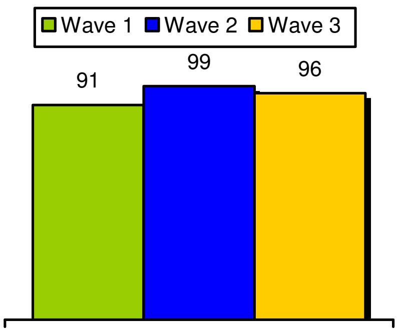
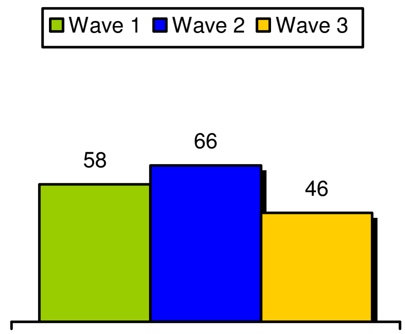
		Wave 2	**Wave 3**
Base: All	*400*	*450*	*367*
Pay electricity & water Bill	36%	64%	68%
Smart Card appointment	2%	15%	23%
Pay traffic contravention	8%	5%	14%

Base: Those who made a transaction

1.4 Overall Satisfaction with the Portal

Overall all respondents are satisfied with the portal services, but when comparing with the past 2 waves, the scores of '**Extremely Satisfied'** has declined significantly in the recent wave (from 66% in wave 2 to 46%), This clearly indicates respondents faced some performance gap. In the forth coming sections, performance gaps will be discussed.

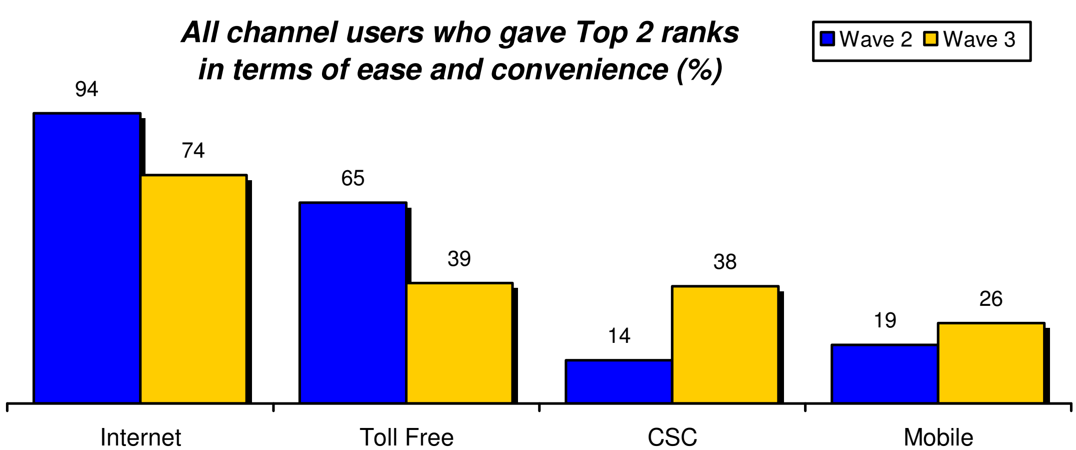
Exhibit 1.7 Overall Satisfaction %

Top 2 Box (Extremely Satisfied/Satisfied)	Top Box (Extremely Satisfied)
	
Base: All Respondents (w1-400) (w2-450) (w3-367)	

1.4.1 Satisfaction on 'Ease of usage and convenience'

During wave 2 **web portal** and **toll free** were emerged as **1st** and **2nd** priority channels respectively in terms ease and convenience. During wave 3 web portal continues to occupy the first place as priority channel however, along with toll free number CSCs too occupy second place as priority channel. This can be further corroborated by the data which shows that in terms of ease and convenience **toll free** ranking has dropped significantly while the ranking of **CSC** (common service center) has increased significantly. However 65% of web portal users still preferred it as their first choice in terms of ease of usage and convenience. Earlier it was around 92%, Hence this is significant drop in terms of ease of usage and convenience by the web portal users.

Exhibit 1.8 Ranking of different channels.



There is perceptible improvement in ease to navigate the webpage form. It seems that suggestion and issues identified during wave 1 were considered and resolved by the concerned authority.

Exhibit 1.9 Ease of finding the website address

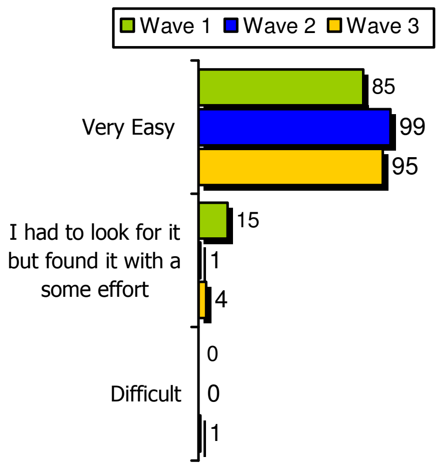
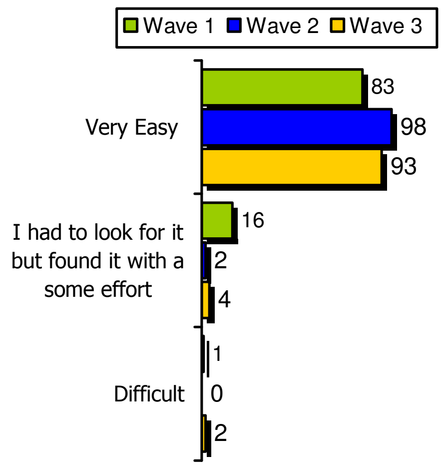


Exhibit 1.10 Ease of navigation in the portal.

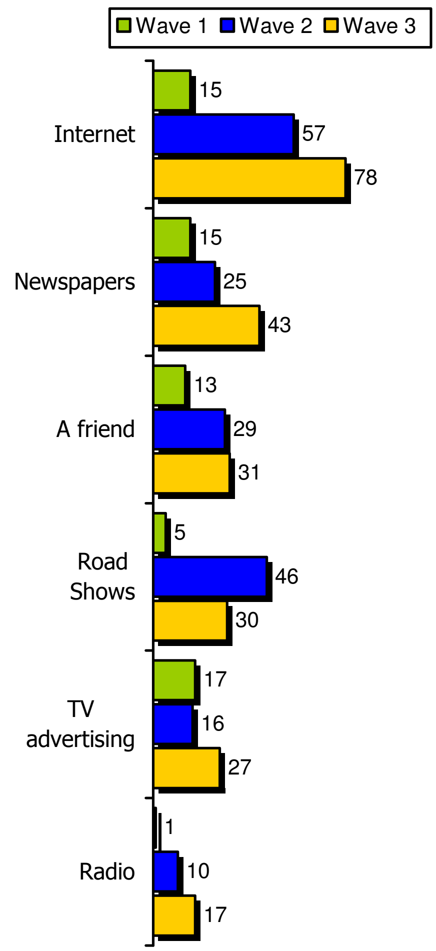


Base: All Respondents (w1-400) (w2-450) (w3-367)

Source of Awareness

Majority users came to know about the portal through internet and newspapers. One third also mentioned other sources like friend, road shows and TV. Very few respondents (less than 20%) mentioned radio as source of awareness. Thus it is very clear that internet and newspapers advertisement made it easy for the respondents to find the web address.

Exhibit 1.11 Source of awareness



Base: All Respondents (w1-400) (w2-450) (w3-367)

1.4.2 Satisfaction on 'Choice and Clarity of Language'

Almost all respondents reported choice of language available in the portal. During the recent wave, half of respondents chose Arabic while the choice of other half was English language. The trend shows that the choice of Arabic language is declined by about 10%, whereas the choice of English is increased by about 10% which could mean that usage among expats (non Arabs) has increased. Further, all respondents found the language clear.

Exhibit 1.12 Language choice available in the portal.

'Yes' there is choice of different languages

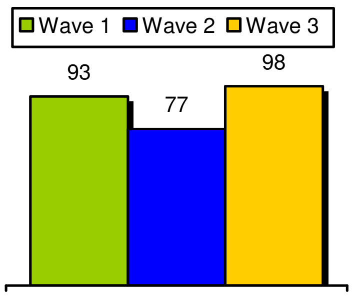


Exhibit 1.13a Language choice in the portal

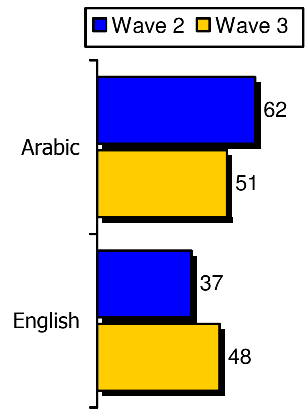
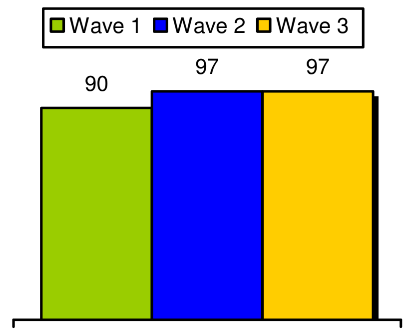


Exhibit 1.13b Clarity of Language in the portal

Those who said language is 'Clear'



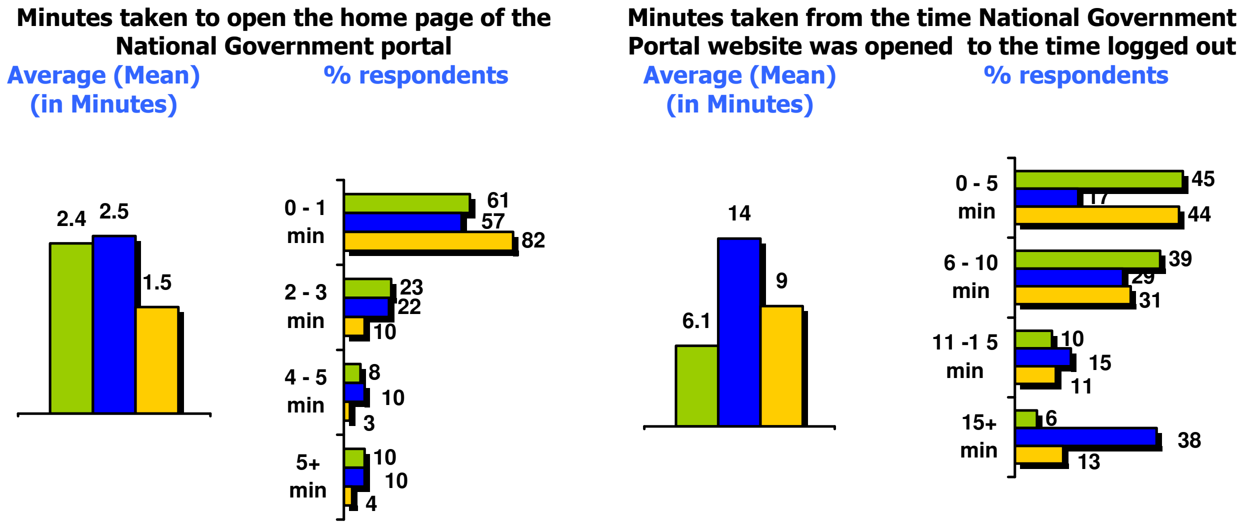
Base: All Respondents (w1-400) (w2-450) (w3-367)

Base: All Respondents who said "Yes, there is choice of different languages" (w1-371, w2-347, w3-358)

1.4.3 Satisfaction on 'Time to Access the Service'

According to the recent survey, majority (82%) respondents expressed that it took around 0 to 1 min to open the page (EGA web portal). Past three waves' trend shows an improvement in percentage of respondents reporting this where the proportion increased from 60% to 82%. The average duration of the full transaction from the time the respondents logged in was recorded as 14 minutes during wave 2 which is now reduced to 9 minutes during wave 2I. Overall the average time to open home page also reduced during wave 2.

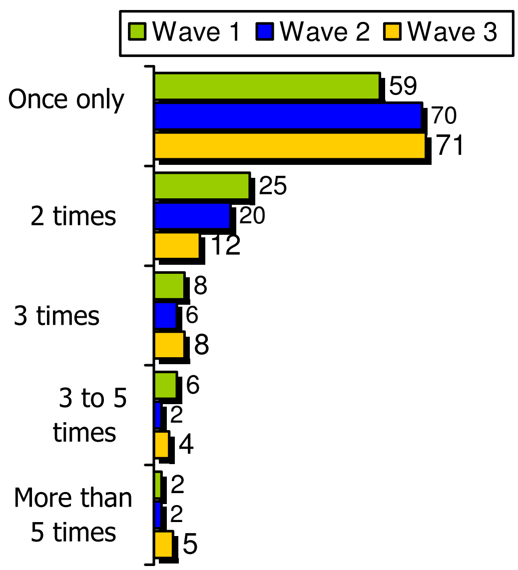
Exhibit 1.14 Average duration to open portal and completing the transaction.



Base: All Respondents (w1-400) (w2-450) (w3-367)

Improvement in overall web transition is evident from the fact that majority of respondents were able to complete their transaction in one visit and there is a clear improvement on this aspect when compared to previous survey data.

Exhibit 1.15 Number of visits to complete One Transaction



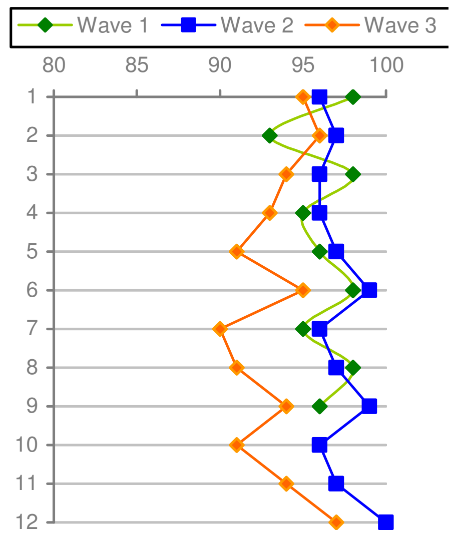
Base: All Respondents (w1-400) (w2-450) (w3-367)

1.4.4 Satisfaction on 'Technical Factors'

Overall portal users expressed positive experience while transacting on the portal. The results were consistent when compared with wave 1 and wave 2. However, during wave 3, scores on all attributes have declined. However, the drop is not substantial and account for 5% to 6% drop. Compared to others scores percentage drop for the attributes such on 'easy to find what you wanted', 'easy to enter personal information' and effective follow-up is more during wave 3.

Exhibit 1.16 Overall Feedback on transaction attributes

1 Simple Transaction
2 Steps to follow were clear
3 Output as Expected
4 No problem in Service delivered
5 Effective follow up/confirmation
6 Secure Transaction
7 Easy to find what you wanted
8 Able to complete all transactions
9 Has range of services
10 Easy to enter personal information
11 Different choices of payment
12 I do not mind doing more transactions

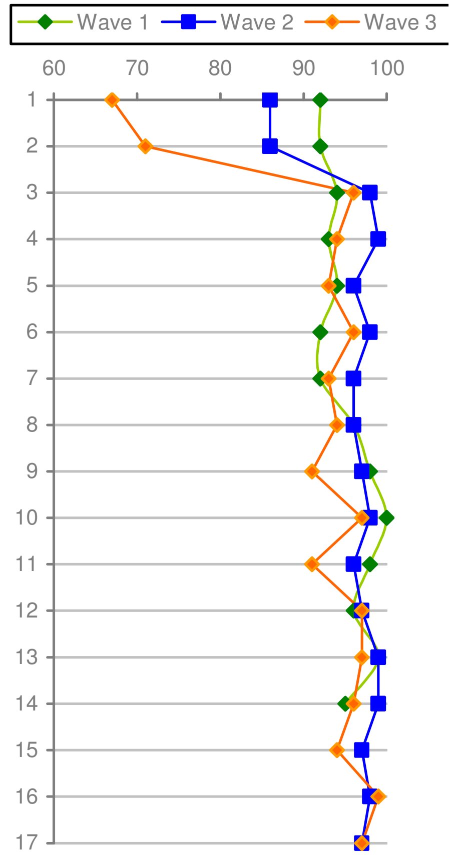


All those with experience in making transactions (w1-400, w2-380, w3-294) (Multiple Response)

As far as the technical factors are concerned, when compare to past 2 waves, similar findings on decline of scores is evident in wave 3 as well. The decline is seen on attributes related to slow service, page looked cluttered and finding the contents/information easily. It may be mentioned here that it seems that over a period of time customer's expectation on time taken to open the web page has gone up. The data shows that the average time to open the web page has come down from 2.4 minutes (wave 1) to 1.4 minutes (wave 3) however, still the respondents find this as slow/time consuming.

Exhibit 1.17 Feedback on technical attributes

1	Page loaded quickly (within 15-20 seconds)
2	Quick to go from one window to other (not more than 15-20 seconds)
3	The page looked pleasant
4	The font size was appropriate
5	Very user-friendly and convenient
6	Matching pictures
7	Systematic contents, clear information
8	The web page looked professional
9	Did not make the page look cluttered
10	Very user-friendly and convenient
11	I could find the links I needed easily
12	I found the information I needed on the website itself. (I did not have to use any other channel)
13	Easy to enter personal information
14	Information was diversified
15	Systematic contents, clear information
16	Contents are easy to understand
17	Contained up to date information



Base: All Respondents (w1-400) (w2-450) (w3-367)

1.5 Problems & Suggestions

The data shows that only 17% respondents during wave 3 voiced concerns on problems encountered while using the portal. The main problem once again was related to slow speed and access.

Exhibit 1.18 Overall Feedback on technical attributes

'Yes' faced the problem

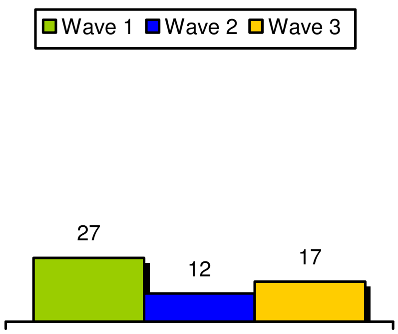
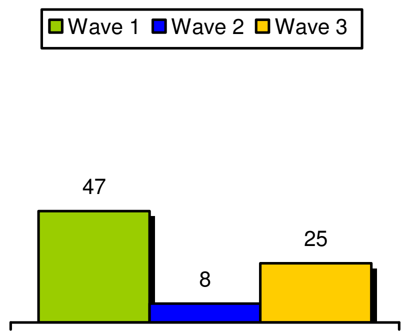


Exhibit 1.19 Additional services required.

'Yes' additional services required.



Base: All Respondents (w1-400) (w2-450) (w3-367)

Exhibit 1.20 Problems faced by the respondents

	Wave 2	Wave 3
Base	*56*	*64*
Slow and difficult to access	55%	58%
Not accept all types of cards	4%	16%
Electricity and water paying bills process is not working well	7%	9%
No receipt number given	2%	5%
All data of government authorities not updated frequently	5%	3%
Always errors with appointments	4%	3%
When entering block number system don't accept it	4%	3%
Didn't deduct the right amount	7%	0%
Language problems	9%	0%
Printed bill through website is not clear and incorrect	2%	0%

Base: All Respondents who faced problems

About 25% respondents have reflected the need for more services to be included in the portal, the additional services required by the respondents include Bill payment facilities (mobile, passport renewal, electricity, violation etc), Information about services (for tourists, useful numbers, bus routes, museum, rules and regulations, housing etc) and to connect all ministries services on the portal. It may be mentioned here that, it seems some of the portal users are not familiar with the services which are already available (those related to bill payment) and therefore this clearly shows their ignorance /lack of awareness on different types of services offered through web portal. This perhaps is one of the reasons for low usage of e services.

Exhibit 1.21 Type of additional services required

	Wave 2	**Wave 3**
Base	*37*	*90*
Bill payment facilities (mobile, passport renewal, electricity, violation etc)	11	24
Information about services (for tourists, useful numbers, bus routes, museum, rules and regulations, housing etc)	5	7
All ministries services should be electronic	0	16

Base: All respondents who wants additional services.

Thus, the data compared over the last 3 waves suggests an improvement in the experience of the web portal users but at the same low awareness on different services available is evident. Although the respondents are not expected to be aware of all 90+ services available but in order to enhance the usability of e channels and reap the benefits for which e services have been introduced, it is important that they are aware of key commonly used services. The study data shows that over 90% of the residents who are aware of e initiative are aware of web portal as a channel but what and to what extent these channels can offer is not known to the masses. Hence, it is important that the focus of marketing campaigns should shift from the 'channel' to services offered.

CALL CENTER

"Call centre will provide information on all government services with certain value added services like status checking and grievance redressal. Taking into consideration the substantial expatriate population in Bahrain, the contact centre will provide multi-lingual support with Arabic, English, Malayalam and Filipino as the key languages"

Source:
eGovernment Strategy – (2007- 2010)

2.0 Interface with call centre /toll free and experience

This section of the report details out the interaction and experience of population in Bahrain who called toll free number center to avail one or more government services. This includes, reasons for calling, interaction with the agent, type of service used, and satisfaction with various attributes of this channel and lastly user's suggestions and expectations.

Section summary and next steps

Half of toll free users belonged to younger age group (<36years). Female participation is quite low in this wave (16%). The toll free contact number was generally used by majority of the respondents to fix Smartcard appointments. Other services availed through toll free included doctor's appointments and obtaining general information and queries. Compare to the last wave, during wave 3 percentage of respondents using toll free number for "getting general information" has doubled.

Overall locating the toll free number was reported as easy. According to the recent survey, the main source of awareness of the toll free number included, friend, newspaper, internet and TV.

The top box satisfaction score (Extremely satisfied score) shows a significant improvement from wave 2 (from 25% to 48%). It is interesting to note that importance of toll free channel has increased from mere being 'important' to 'necessary channel' -It's a necessary channel, I will always need it) 23% to 54% in wave 3. The findings can be further corroborated from the figures where number of respondents saying that 'they would definitely use the toll free in future' has also increased significantly from 35% to 75% in this wave. This shows that respondents are now considering toll free as more important channel. Across all the three waves, overall the toll free users expressed positive experience while transaction with consistent and improved performance.

Most of the respondent (70%) took less than 1 minute to get in touch with an agent at the contact centre. Compare to last waves the average (mean) time reduced from 1.1 minutes to 0.5 minute.

About three forth of respondents could complete one transaction within 5 minutes. All three waves showed that about 60% respondents could complete their transaction in a single call.

Although, when asked from all channel users (out of 1019 respondents) this noticeable that in terms of ease and convenience **toll free** ranking has dropped significantly while the ranking of **CSC** (common service center) has increased significantly. However 34% of toll free users still preferred it as their first choice in terms of ease of usage and convenience.

For further improvement the following points needs attention. About 16% expressed that they encountered problems while using the toll free number. The main problems are related to waiting a long time to contact the call center agent, not providing the appointment services and inability of the contact centre to resolve problems. Thus this channel is not viewed a complete solution provider.

2.1 Respondents' Profile

Like wave 2, during wave 3 toll free users were contacted using a database provided by EGA. Out of the total contacts made 84% male and 16% female users agreed to participate in the survey. Half of toll free users belonged to younger age group (<36years). Female participation was bit higher during wave 2.

Exhibit 2.1 Distribution of Respondents across Age groups (Toll-free users)

		Wave 2	**Wave 3**
Base: All	*400*	*250*	*250*
15-18 Yrs	2%	0%	1%
19-25 Yrs	29%	24%	14%
26-35 Yrs	35%	38%	36%
36-45 Yrs	21%	22%	28%
46-55 Yrs	10%	15%	18%
55 Yrs+	3%	2%	3%

Base: All Respondents

Exhibit 2.2 Distribution of Respondents across gender groups (Toll-free users)

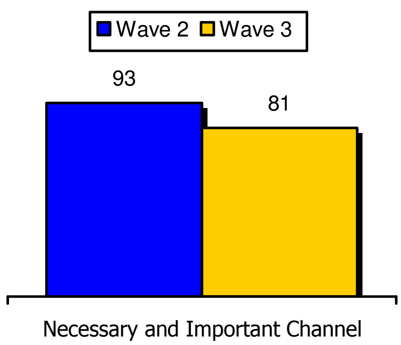
		Wave 2	**Wave 3**
Base: All	*400*	*250*	*250*
Male	72%	79%	84%
Female	28%	21%	16%

2.2 Importance of Toll Free

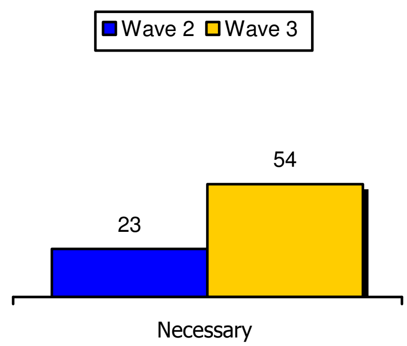
It is interesting to note that importance of toll free channel has increased form mere important to necessary channel (It's a necessary channel, I will always need it) from 23% to 54% during this wave. The findings can be further corroborated from the figures below where number of respondents who reported that 'they would use the toll free in future' has also increased significantly from 35% to 75% during wave 3. This indicates that respondent have once again started considering toll free as more important channel.

Exhibit 2.3 Importance of toll free

Top 2 Box (Necessary /Important)



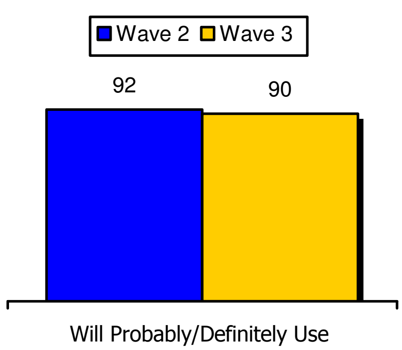
Top Box (Necessary)



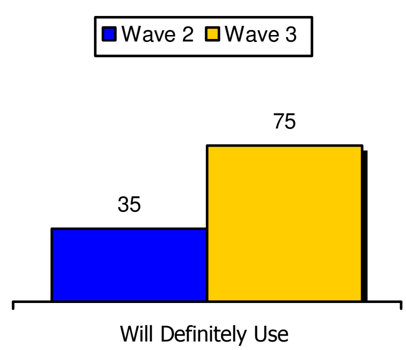
Base: All Respondents (w1-400) (w2-250) (w3-250)

Exhibit 2.4 Future intention to use.

Top 2 Box (Definitely/Might Use)



Top Box (Definitely Use)



Base: All Respondents (w1-400) (w2-250) (w3-250)

2.3 Reason for calling Toll Free

Across all three waves fixing smart card appointment emerged as one of the key reasons for using toll free number. However, the number of respondents using this number for obtaining general information and queries has also gone up from 14% to 35% during wave 3. Thus compared to the last wave, during wave 3 percentage of respondents using toll free for "getting general information" has doubled, on the other hand percentage of respondents who made a transaction through toll free has dropped from 34% to 10% during wave 3.

Exhibit 2.5 Reason for calling toll free number

		Wave 2	Wave 3
Base: All	*400*	*250*	*250*
Smart card appointment	40%	80%	64%
Obtain general information and queries	24%	14%	35%
I had to make a transaction	0%	34%	10%
Doctor's appointment	22%	10%	1%
Follow up on earlier demand	9%	12%	2%
Register Complain	5%	2%	2%

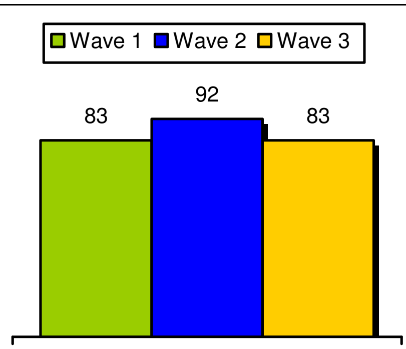
Base: All Respondents

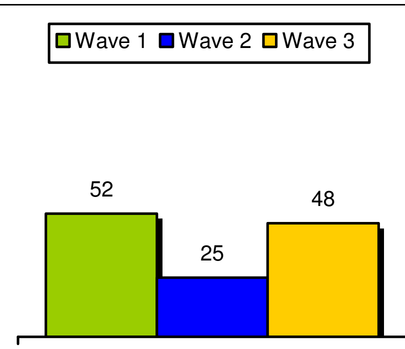
2.4 Overall Satisfaction with Toll Free

Overall satisfaction has dropped from 92% (wave 2) to 83% (wave 3). However the score of 'Extremely satisfied' has doubled from 25% to 48% in this wave.

Exhibit 2.6 Overall Satisfaction %

Top 2 Box (Extremely Satisfied/Satisfied)	Top Box (Extremely Satisfied)





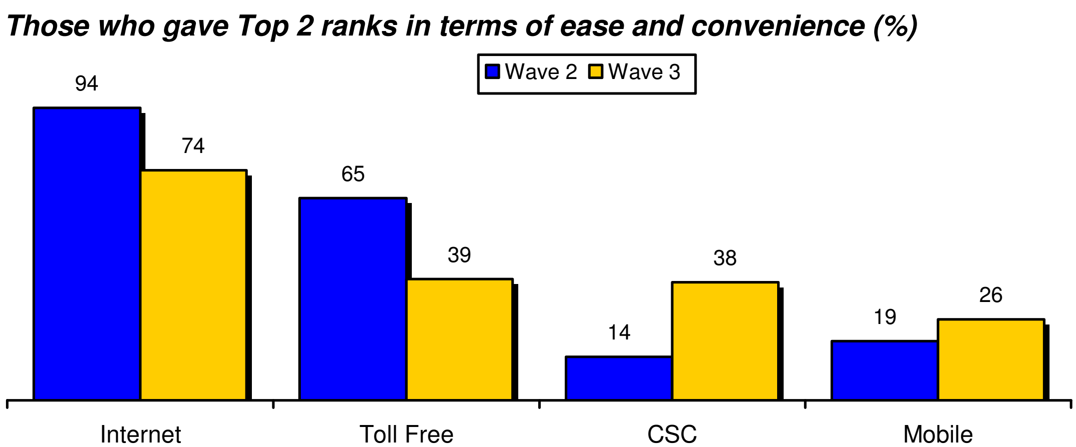
Base: All Respondents (w1-400) (w2-450) (w3-367)

2.4.1 Satisfaction on 'Ease of usage and convenience'

When asked that which channel is most preferred in terms of ease and convenience. About 70% of all respondents ranked **web portal** as their **first** priority. And 39% of respondents ranked toll free as their **2nd** preference. But at the same time CSC also emerge as equally preferred channel along with toll free.

This is also noticeable that in terms of ease and convenience **toll free** ranking has dropped significantly while the ranking of **CSC** (common service center) has increased significantly. This clearly shows the popularity of CSCs.

Exhibit 2.7: Ranking of channels in terms of 'Ease of usage and convenience'



Base: All Respondents

Finding the toll free number was not a difficult task. Over 90% respondents found it 'very easy' to navigate through the recorded messages across all waves.

Exhibit 2.8 Ease of finding the toll free number

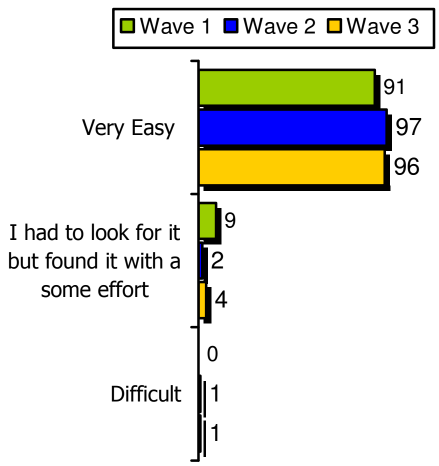
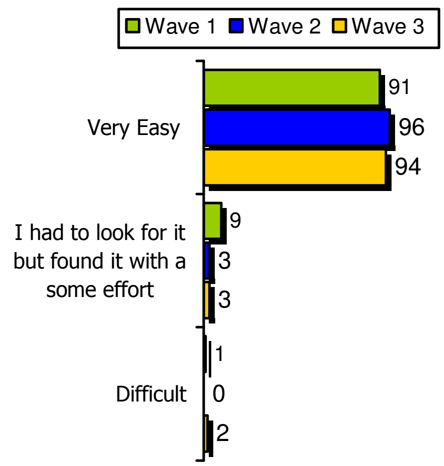


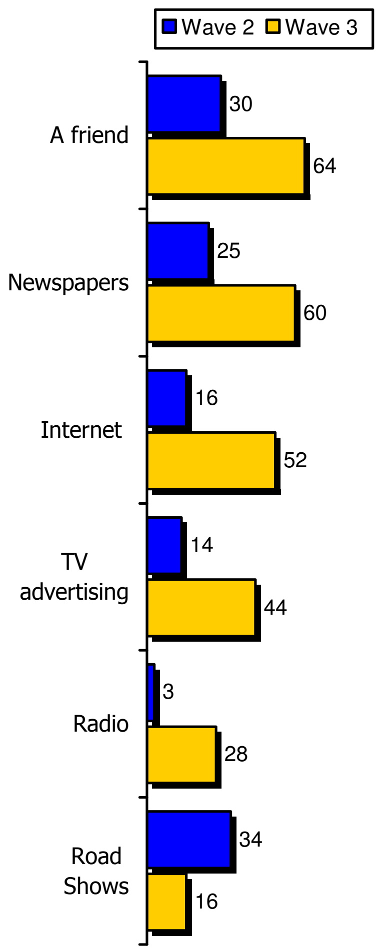
Exhibit 2.9 Ease of navigation through toll free no.



Base: All Respondents (w1-400) (w2-450) (w3-367)

According to the recent survey, no single source of emerge as the the main source of awareness. The respondents came to know this channels from multiple sources which included, friend, newspaper, internet and TV.

Exhibit 2.10 Channels promoting Awareness



Base: All Respondents

2.4.2 Satisfaction on 'Choice and Clarity of Language'

The data shows that some of the respondents did not find the agent speaking their choice of language. Arabic language was the most widely used language. The language was reported to be clear by al most all of the users.

Exhibit 2.11 Language choice

'Yes' there is choice of different languages

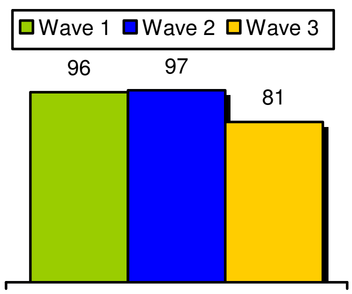


Exhibit 2.12 Choice of languages

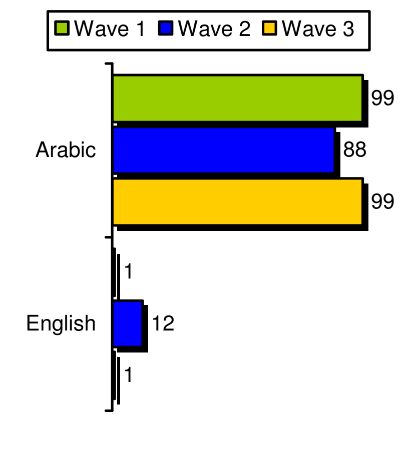
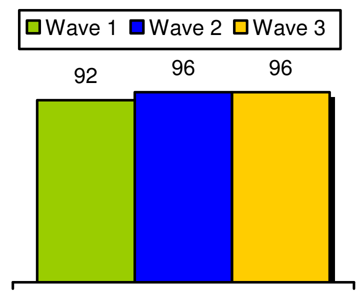


Exhibit 2.13 Clarity of Language

Those who said language is 'Clear'



Base: All Respondents (w1-400) (w2-250) (w3-250)

2.4.3. Satisfaction with 'Time to Access the Service'

According to the latest figures, most of the respondent (70%) took less than 1 minute to get in touch with an agent at the contact centre. Compare to last waves the average (mean) time reduced from 1.1 minutes to 0.5 minute. The findings show that there is consistent decline in time taken to get in touch with the agent.

About three forth of respondents could complete one transaction within 5 minutes. The average (mean) time to complete one transaction was around 4 minutes.

Exhibit 2.14 Time taken to get in touch with agent

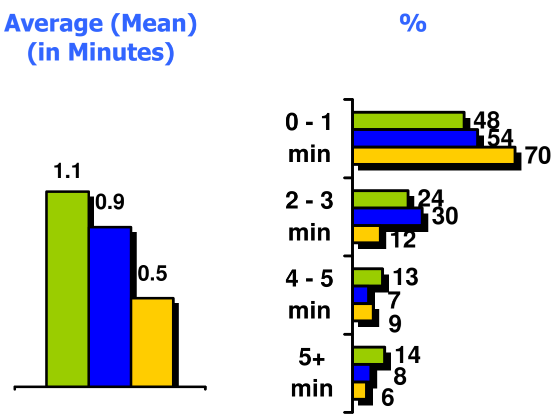
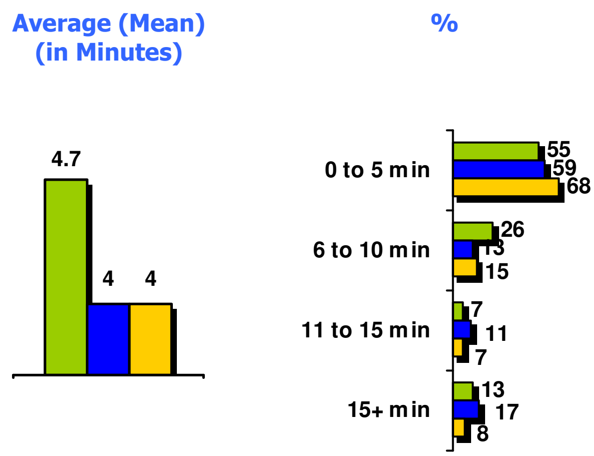


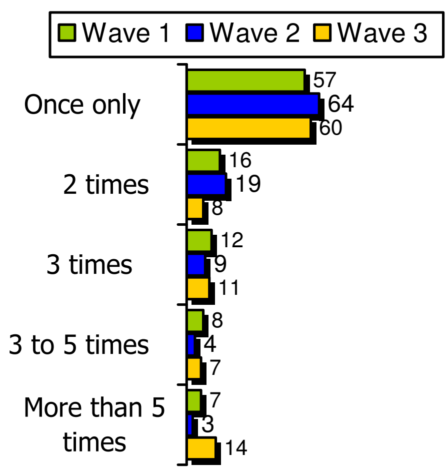
Exhibit 2.15 Time taken to complete one transaction



Base: All Respondents (w1-400) (w2-250) (w3-250)

All three waves showed that about 60% respondents could complete their transaction in one call only. However, the recent survey shows that 14% of the respondents had to connect more than 5 times to complete their transaction.

Exhibit 2.16 Number of calls to complete One Transaction



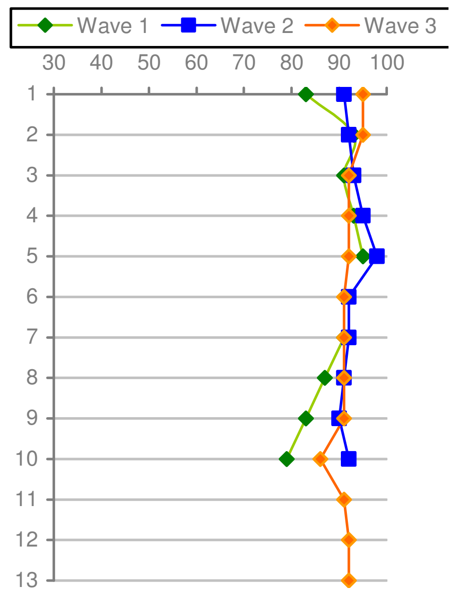
Base: All Respondents (w1-400) (w2-250) (w3-250)

2.4.4. Satisfaction with 'Technical Aspects'

Across all the three waves, the toll free users expressed positive experience while using toll free services.

Exhibit 2.17 Satisfaction with the traction

1 Final output was as per expectation
2 Transaction was secure
3 Easy to communicate your need
4 Clear steps
5 Transaction was simple
6 Do not mind doing more transactions at
7 Wide range of services
8 No problem in the service
9 You were able to complete all the transaction without
10 Effective follow-up
11 I did not have to use any other channel
12 Got complete information
13 Accurate information



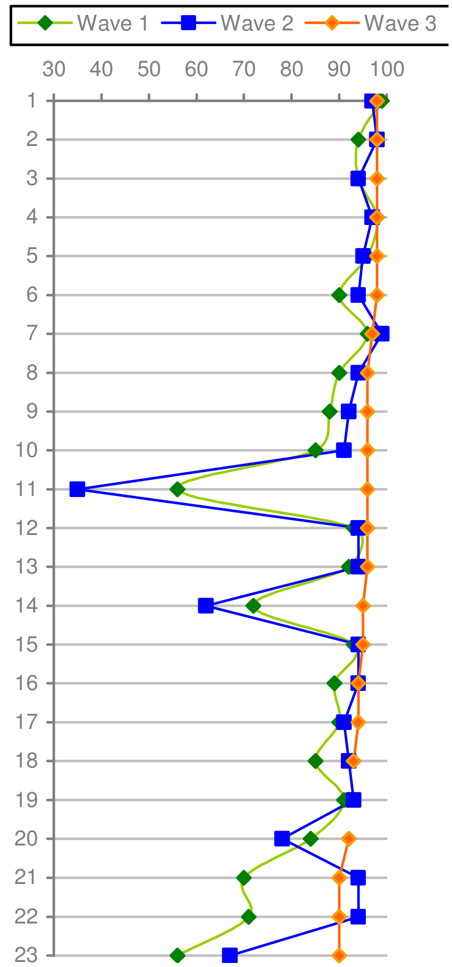
Base: All Respondents (w1-400) (w2-250) (w3-250) (Multiple Response)

2.4.5. Satisfaction with Agent at Call Centre

At an overall level the feedback on the call centre agent was significantly positive. There is a significant improvement on various attributes such as; 'said his name', 'asked if you need anything else' and 'asked for your name'.

Exhibit 2.18 Satisfaction with agent

1 Could speak your preferred language properly
2 Had a cheerful voice
3 Listened to you carefully
4 Spoke Clearly
5 Understood your request
6 Was helpful
7 Welcome and greeted you
8 Directed you to the right following step
9 Gave convincing answers
10 Replied promptly
11 Said his name
12 Said thank you for calling/using e-services
13 Was Confident
14 Asked for your name
15 Concentrated on the transaction
16 Gave accurate information
17 Had good knowledge regarding the e-services
18 Had the information available with himself/herself
19 Knew exactly the right procedure to follow
20 Asked if you need anything else
21 Asked for personal information for transaction purposes
22 Did not propose that you go to any location
23 Used your name while dealing with you



Base: All Respondents (w1-400) (w2-250) (w3-250)

The findings of the study also show that almost 47% of the respondents reported that if toll free number was a paid number they would not use this facility, which means that in spite of all convenience not everyone is ready to spend for it. However, the positive point is that majority are willing to use even if it is a paid number.

2.5 Problems & Suggestions

According to the recent wave about 16% expressed that they encountered problems while using the toll free number. And about 8% respondents expressed need for additional services required.

Exhibit 2.19 Faced any problem

'Yes' faced the problem

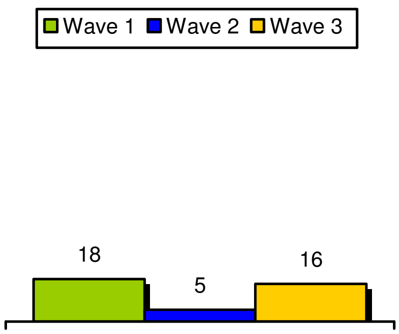
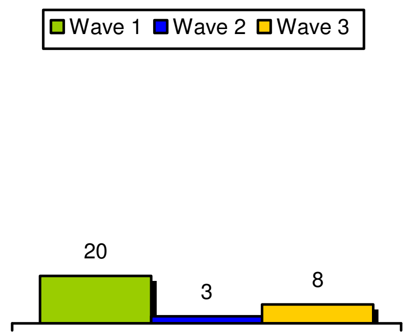


Exhibit 2.20 Services to be Included in the call center.

'Yes' additional services required.



Base: All Respondents (w1-400) (w2-450) (w3-367)

The main problem related to waiting a long time to contact the call center agent and not been able to provide appointment services.

Exhibit 2.21 Type of problems.

	Wave 1	Wave 2	Wave 3
Base:	*73*	*12*	*39*
Waiting a long time	58%	92%	51%
Appointment problems	7%	0%	26%
Disability of solving problems	3%	8%	18%
Unprofessional staff	26%	8%	8%
No update for CPR	3%	0%	0%
There is no follow up	5%	0%	0%

Base: All Respondents who faced problems

Thus to summarize it can be said that toll free has once again emerged as an important channel and almost all the users have expressed satisfaction using the same but at the same time probability of using this in future, if converted into paid services, may come down.

MOBILE PORTAL

"According to the latest figures," HE the Minister of State for Cabinet Affairs said, "Mobile penetration in Bahrain currently stands at 119%, considered to be a very high rate. As such, we have ensured that we offer government eServices to the public through this popular channel with which they are already very familiar, so that they gain maximum ease of use and benefit."

HE the Minister went on to say that the Mobile Portal will allow anyone with a mobile phone to communicate with complete ease with all government entities and avail of their services. The services, which have been specifically engineered for mobile phones, are accessible through a mobile version of the National Portal to WAP- equipped phones, in addition to other services available through SMS.

The initial phase of the Mobile Portal will include 11 basic government services, with 39 more to be rolled out by year's end, bringing the total to 50 services in all. Some of the key services are: enquiries regarding electricity bills and traffic contraventions, daily price index, flight information, school examination results, and registration of complaints to various government bodies.

3.0 Interface with Mobile Portal Users and experience

This section of the report details out the interaction and experience of population in Bahrain who used mobile portal to avail one or more government services. This would include purpose of connecting to mobile portal and satisfaction with various attributes of this channel and lastly user's suggestions and expectations. It may be noted that Mobile portal as a channel was not included during the wave 1. Hence this section will detail out the findings pertaining to wave 2 and 3 only.

Section summary and next steps

About 200 mobile portal users were contacted from the database provided by EGA. Out of the total contacts made 80% males and 20% of female users agreed to participate in the survey.
Majority used Batelco services, Zain service was used by 31%. Majority of mobile portal users contacted the EGA through mobile portal; only about 21% of respondents contacted the EGA through SMS. However, compared to the previous wave there is a significant increase of SMS users in this wave with an increase of 3% to 21%. Majority of users (more than half) came to know abou the mobile portal through internet, friend and newspapers.

Common services accessed through mobile were health care services, electricity and water bill enquiry, flight information and financial support services for citizens

Overall satisfaction with the mobile portal dropped from 98% to 84%. Further, 'extremely satisfied' percentage dropped from 70% to 43% in during wave 3. Drop in the satisfaction rate is evident from the decline in the importance accorded to this channel. The data shows that the mobile portal as an important channel is considered by 89% during wave 3, whereas this percentage was 93% during wave 2. The findings can be further corroborated from the figures below where number of respondents 'they would use the mobile portal in future' has also dropped from 99% to 91%. In comparison to other channels, mobile channel ranking is low; one-fourth of toll free users preferred it as their **first** choice in terms of ease of usage and convenience. Percentage of all technical attributes dropped in the recent wave. Two attributes 'Page loaded quickly (15-20 sec)' and 'Quick to go from one window to other' acquired relatively low ratings (less than 80%).
Overall majority did not report any issues faced through this channel except that about 12% reported slow internet service and improvement needed on speed of internet. Similarly, about 14% respondents suggested inclusion of bill payment facilities.

According to the results of both waves, more than 80% respondents expressed that it took around 1 minute to open mobile portal and 1 minute of to open other required links on portal. There is significant improvement in time taken to complete one transaction. It took around 4.7 minutes to complete one transaction. About 79% respondents completed their transaction in one visit.

Only 21% of mobile users contacted the EGA through SMS service, one-third of respondents accessed through Batelco service, while around 21% of them through Zain service. The main sources of awareness of SMS include friend, newspaper and TV. About half of respondents received SMS response within 1 minute. About 30% received the response within 2 to 5 minutes. And about 20% expressed that it took more than 10 minutes to get the response. Overall 93% respondents are satisfied with the SMS service, and 33% of them are extremely satisfied.

3.1 Respondent Profile

About 200 mobile portal users were contacted from the database provided by EGA. Out of the total contacts made 80% males and 20% of female users agreed to participate in the survey. There is perceptible drop in the percentage of female users. Further, the data shows that almost two third of respondents were less than 35 years of age. Comparison with other channels shows that almost two third of mobile portal users are <35 years which indicates that this channel is more popular among the younger age group who very mobile savvy and are comfortable using the phone for various uses. Thus the marketing thrust could toward the young and mobile savvy population.

Exhibit 3.1 Age of respondents

Mobile Portal users	Wave 2	Wave 3
Age group	**% of Total Sample**	
Base: All	*201*	*202*
19-25 Yrs	38%	25%
26-35 Yrs	39%	34%
36-45 Yrs	17%	25%
46-55 Yrs	5%	8%

Base: All Respondents (w2-201) (w3-202)

Exhibit 3.2 Gender of respondents

Mobile Portal users	Wave 2	Wave 3
Gender	**% of Total Sample**	
Base: All	*201*	*202*
Male	67%	80%
Female	33%	20%

Batelco services continue to be more popular than Zain. Majority of mobile portal users used e services portal while only about 21% of respondents used SMS. However, comparison with the previous wave shows that there is a significant increase of SMS users during current wave, (3% to 21% increase).

Exhibit 3.3 Current mobile service

Mobile Portal users	Wave 2	Wave 3
Current mobile service	**% of Total Sample**	
Base: All	*201*	*202*
Zain	41%	31%
Batelco	59%	68%

Base: All Respondents (w2-201) (w3-202)

Exhibit 3.4 Method of Accessing the Portal

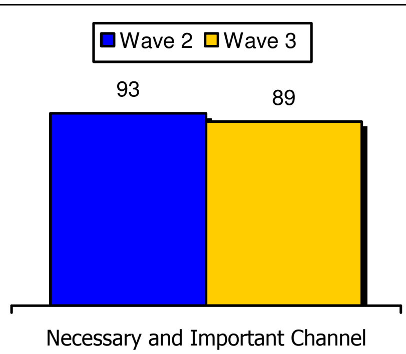
Mobile Portal users	Wave 2	Wave 3
Method of Accessing	**% of Total Sample**	
Base: All	*201*	*202*
Through Internet on my mobile	97%	79%
Through SMS	3%	21%

3.2 Importance of Mobile Portal

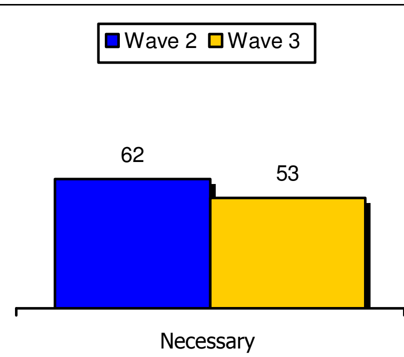
Importance of mobile portal channel has declined from 93% t0 89%. The findings can be further corroborated from the figures below where number of respondents saying that 'they would use the mobile portal in future' has dropped from 99% to 91%.

Exhibit 3.5 Importance of portal

Top 2 Box (Necessary /Important)



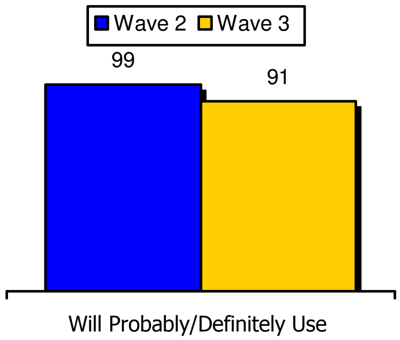
Top Box (Necessary)



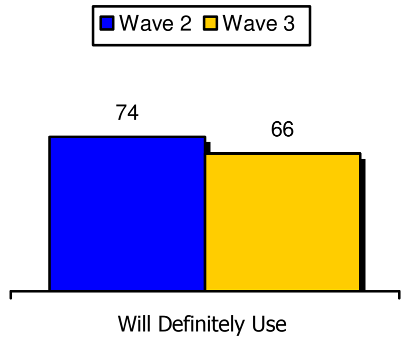
Base: All Respondents (w2-201) (w3-202)

Exhibit 3.6 Future Intention to use the portal through mobile.

Top 2 Box (Definitely/Might Use)



Top Box (Definitely Use)



Base: All Respondents (w2-201) (w3-202)

3.3 Reason for Visit to the Mobile Portal

As per the recent survey, the common services accessed through mobile were health care services, electricity and water bill enquiry, flight information and financial support services for citizens.

Exhibit 3.7 Reasons for Visiting the mobile portal

Mobile	Ever Used Services
	Wave 3
Base: All	*202*
Health care services	55%
Electricity and water bills	52%
Flight information	37%
Foreign affairs	29%
Local and international news	25%
Feedback on mobile portal	23%
Financial support service for citizens	18%
Graduate Examination results	8%
Government directory	9%
Tracking postal packages	9%
Prayer time	6%
Ramadanyat	5%
Cultural events	2%
Unit maintenance enquiry status	2%
Tender service	1%

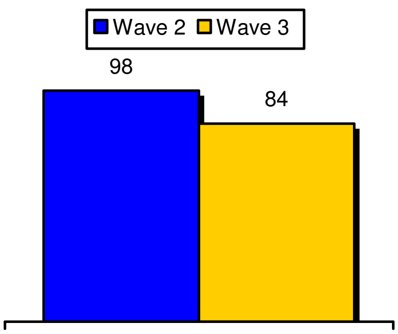
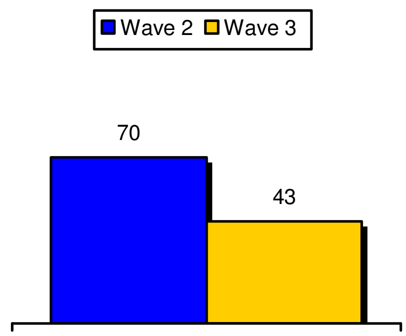
Mobile	Last Used Service	
	Wave 2	Wave 3
Base: All	*201*	*202*
Electricity and water bills	23%	27%
Health care	16%	20%
Local and international news	7%	12%
Feedback on mobile portal	11%	11%
Flight information	18%	11%
Foreign affairs	2%	5%
Financial support service for citizens	12%	3%
Government directory	0%	2%

Base: All Respondents (w2-201) (w3-202)

3.4 Satisfaction with Mobile Portal

Overall satisfaction with the mobile portal services dropped from 98% to 84% further, 'extremely satisfied' level, dropped from 70% to 43% in this wave. This decrease could have lead to a drop in the 'importance' of this channel.

Exhibit 3.8 Overall Satisfaction %

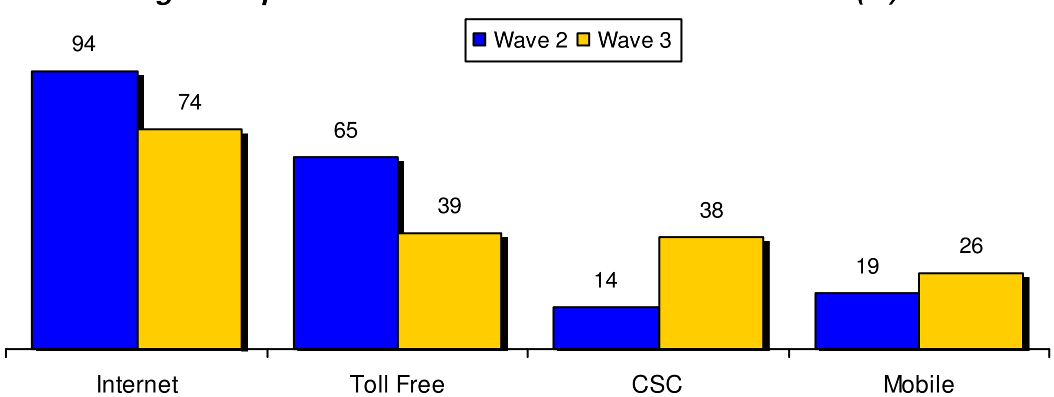
Top 2 Box (Extremely Satisfied/Satisfied)	Top Box (Extremely Satisfied)
	
Base: All Respondents (w2-201) (w3-202)	*Base: All Respondents (w2-201) (w3-202)*

3.4.1 Satisfaction on 'Ease of usage and convenience'

When asked that which channel is most preferred in terms of ease and convenience. About 74% of all respondents ranked **web portal** as their **first** priority. And around **half** of respondents ranked toll free as their **2nd** preference.

Exhibit: Ranking of channels in terms of 'Ease of usage and convenience'

Those who gave Top 2 ranks in terms of ease and convenience (%)



During wave 3 mobile channel ranking is lowest in terms of ease and convenience but at the same time 90% of the respondents reported good comfort level with mobile portal though this percentage declined from 96 % in wave 2 to 90% during wave 3. Further, there is also a drop in the percentage respondents mentioning 'it is very easy to navigate the webpage through the mobile' (94% to 84%). It would be worth while to mentioned here that during our interaction with the mobile portal users it was reported that small screen of the mobile was not very comfortable and put lot of strain on the eyes. Further, consistent connectivity of the portal was also an issue for some of the respondents. Perhaps these could be some of the reasons for not reporting mobile portal as easy and comfortable channel.

Exhibit 3.9 Ease of finding the mobile portal address

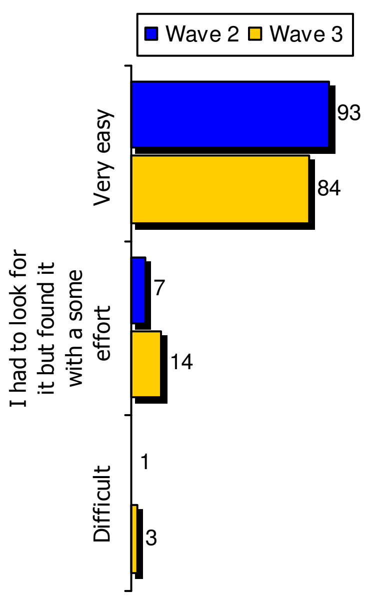
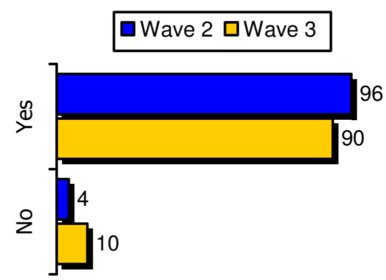


Exhibit 3.10 Comfortable with mobile portal



Base: All Respondents (w2-201) (w3-202)

Exhibit 3.11 Ease of finding the mobile portal address

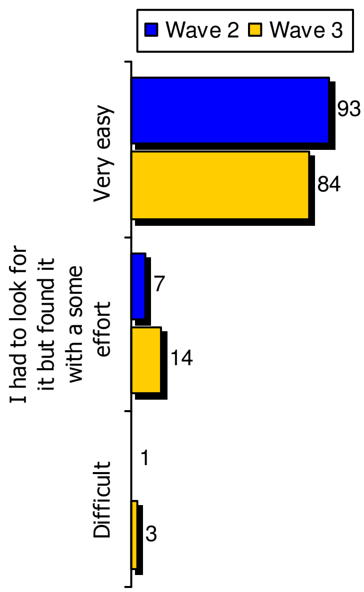
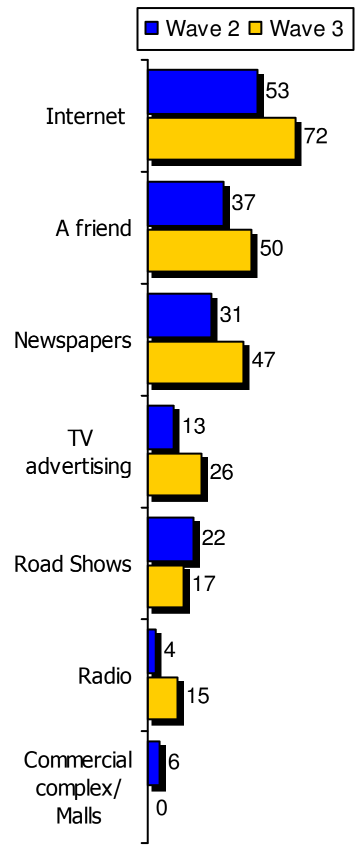


Exhibit 3.12 Source of awareness



Base: All Respondents (w2-201) (w3-202)

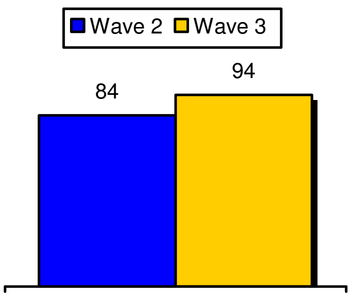
The findings indicate that perhaps the visibility of mobile portal was not that high during wave 3 as 17% of the respondents had to put in some efforts to locate the details on mobile portal. Further, internet, friend and newspapers emerge as the more popular sources of awareness than others mentioned above. Road shows and Malls as source of information recorded very low recall, which means the concerned authority need to review their marketing channels.

3.4.2 Satisfaction with 'Choice and Clarity of Language'

As per the recent survey, more than 90% respondents agreed that there is a choice of language available in the portal. There is a significant change in the choice of Arabic and English language by the mobile portal users. Data shows that choice of English language increased while choice of Arabic language decreased, this could be due to fact that more number of non Bahraini started using the mobile portal services. However, opinion on clarity of language has dropped by 12%.

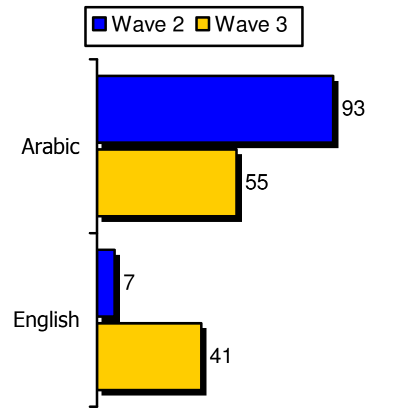
Exhibit 3.13 Language choice available in the portal.

'Yes' there is choice of different languages



Base: All Respondents who used the e service through Internet on mobile (w2-195, w3-160);

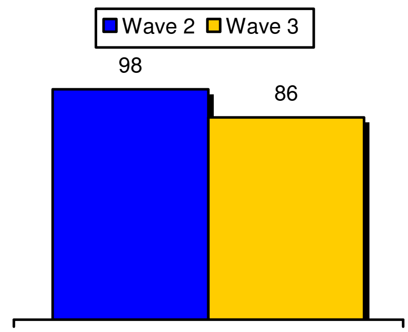
Exhibit 3.14 Language choice



Base: All Respondents who said "Yes, there is choice of different languages" (w2-163, w3-150);

Exhibit 1.13b Clarity of Language

Those who said language is 'Clear'



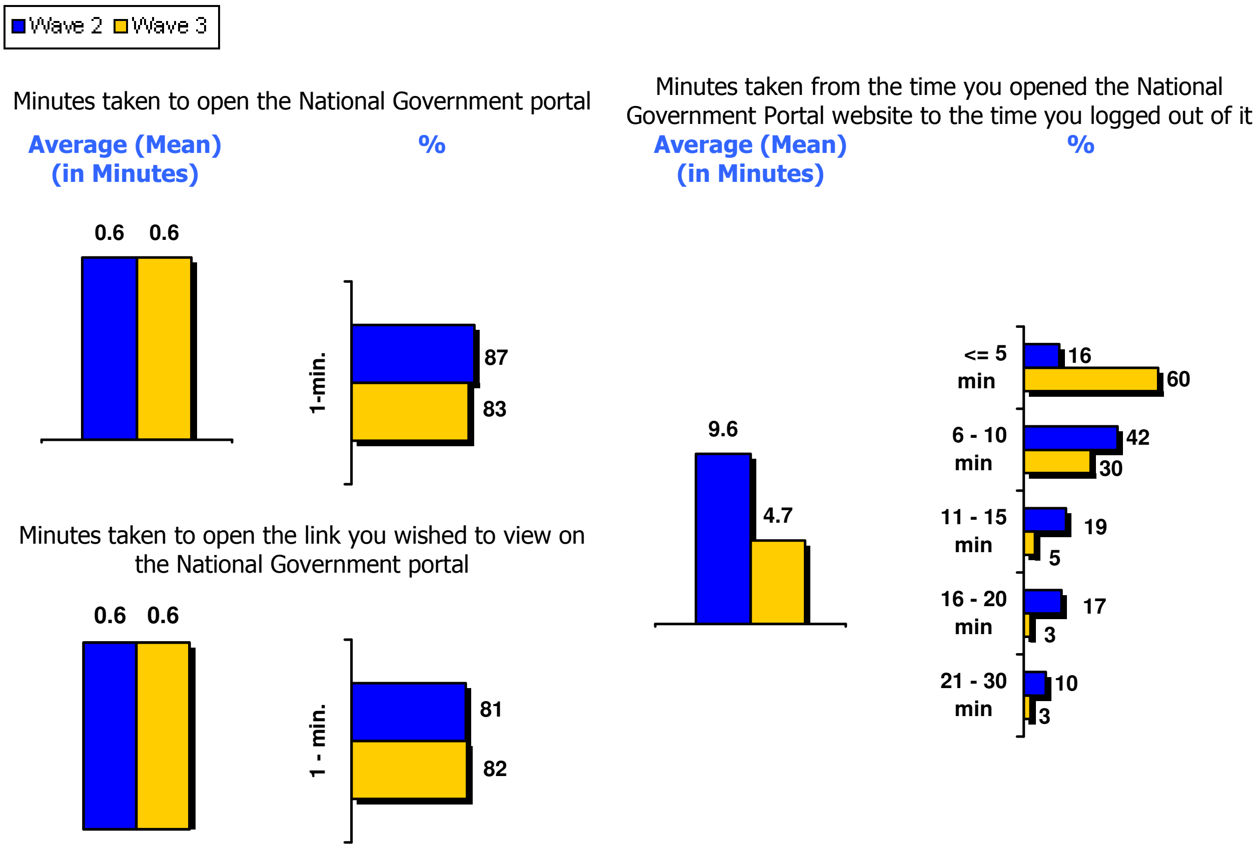
Base: All Respondents who used the e service through Internet on mobile (w2-195, w3-160);

3.4.3 Satisfaction on 'Time to Access the Service'

According to the results of both waves, more than 80% respondents expressed that it took around 1 minute to open mobile portal and 1 minute of to open other required links on portal.

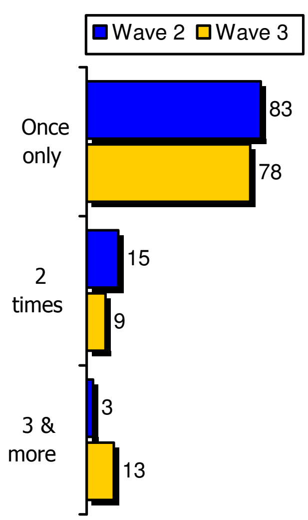
There is significant improvement seen in the time to complete one transaction. It took around 4.7 minutes to complete one transaction which has significantly reduced from 9.6 when compared with wave 1. Similarly, majority (60%) respondents took less than 5 minutes to complete one transaction, earlier this percentage was around 16% only. Even though average time form the time user logged in and logged out has reduced , number of visits to complete one transaction has gone up for some more number or respondents during wave 3. The data shows that 79% respondents completed their transaction in one visit whereas another 18% had to visit 2 to 3 times to complete the transaction.

Exhibit 3.15 Average duration to open portal and completing the transaction.



Base: All Respondents who used the e service through Internet on mobile (w2-195, w3-160);

Exhibit 3.16 Number of visits to complete One Transaction



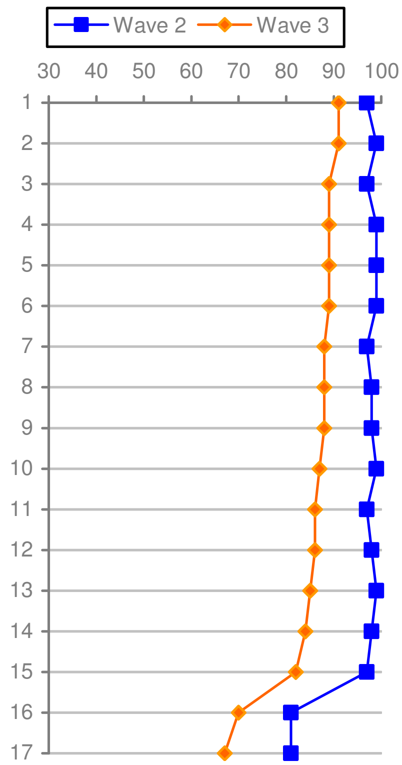
Base: All Respondents who used the e service through Internet on mobile (w2-195, w3-160);

3.4.4 Satisfaction on 'Technical aspects '

Almost all technical attributes dropped in the recent wave. Two attributes 'Page loaded quickly (15-20 sec)' and 'Quick to go from one window to other' acquired relatively low ratings (less than 80%)

Exhibit 3.17 Satisfaction with technical factors (% of Yes)

1 Easy to understand (page contents)
2 Pleasant page
3 Professional page
4 Contents did not cluttered
5 Clear flow of information
6 Clear flow of information
7 Appropriate font size
8 Easy to enter personal information
9 Page was user-friendly / convenient
10 Up to date information
11 Well matched pictures with the services
12 User-friendly / convenient
13 Diversified information
14 Found the required information
15 Links found easily
16 Page loaded quickly (15-20 sec)
17 Quick to go from one window to other (Not more than 15-20 sec)



Base: All Respondents who used the e service through Internet on mobile (w2-195, w3-160); (Multiple Response)

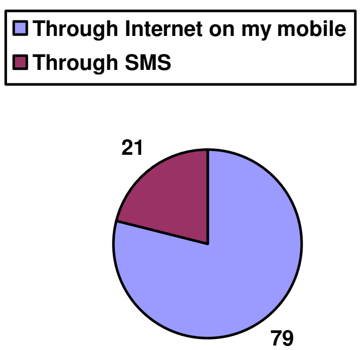
It looks like as the users have started using this service they have started observing and experiencing the interaction more closely and hence have come out with more candid feedback. And perhaps all these aspects have resulted in low preference to this e channel over others.

3.5 Accessing through SMS

As discussed above, only 21% of mobile users availed services through SMS, one-third of respondents accessed through Batelco service, while about 21% of them used through Zain service. The main sources of awareness of SMS include friend, newspaper and TV.

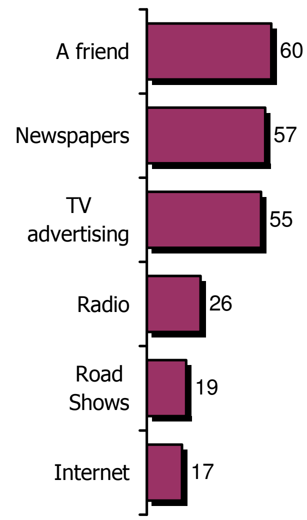
Exhibit 3.18 Method of Accessing services through Mobile

(%)



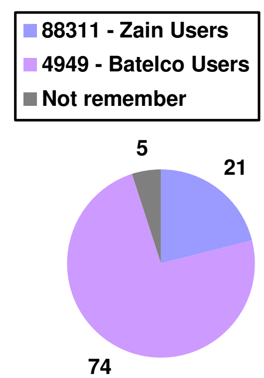
Base: All Respondents (w3-202)

Exhibit 3.19 Source of awareness of short code



Base: All Respondents who used the e service through SMS on mobile (w3-42);

Exhibit 3.20 Awareness of SMS number



Base: All Respondents who used the e service through SMS on mobile (w3-42);

About half of respondents received SMS response within 1 minute. About 30% received the response within 2 to 5 minutes. And about 20% expressed that it took more than 10 minutes to get the response. Overall 93% respondents are satisfied with the SMS service, and 33% of them are extremely satisfied.

Exhibit 3.21 Time taken for you to receive the SMS about the information of e-service you had requested for (%)

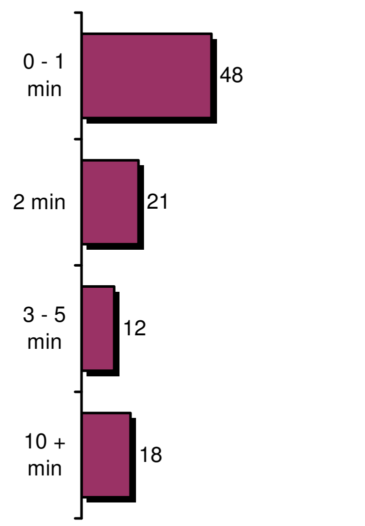
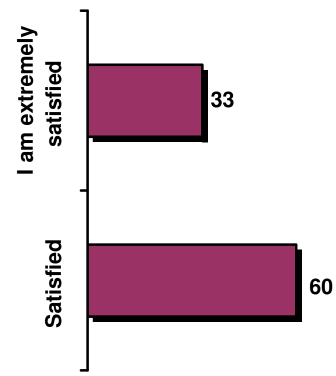


Exhibit 3.22 Satisfaction level with SMS (%)

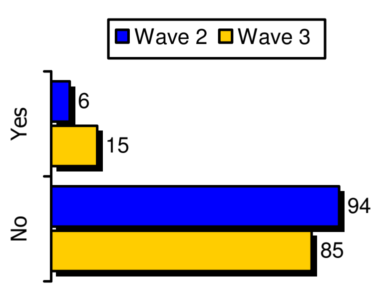


Base: All Respondents who used the e service through SMS on mobile (w3-42);

3.6 Problems & Suggestions

Overall majority users did not report major issues faced with the portal. About 12% reported the case of slow internet service and need improvement on speed of internet. Similarly, about 14% respondents suggested including bill payment facilities.

Exhibit 3.23 Faced any problem



Base: All Respondents who used the e service through Internet on mobile (w2-195, w3-160)

COMMON SERVICE CENTER

HE The Minister of State for Cabinet Affairs, Shaikh Ahmed bin Ateyatallah Al Khalifa commented “they target a segment of society which prefers low-tech eGovernment solutions. These centers will be strategically located throughout the Kingdom, thereby sparing customers the time and effort of physically going from one Ministry to another, and at the same time reducing traffic congestion and queues.”

15 such centers will be set up in post offices and other community centers to cover all of Bahrain, thus putting them within reach of everyone. The first center, located in the Budaiya Post Office, officially begins its operation today.

HE The Minister of State for Cabinet Affairs went on to say that the Common Service Centers will allow the general public to access any government service through the government employee present at the CSCs representing all government bodies. In addition, the centers will have “eService Platforms” (or eKiosks), which are machines that resemble and work much in the same way as ATM machines, thereby allowing customers to complete their own eServices easily.

4.0 Interface with Common Service Centers and experience

This section of the report details out the interaction and experience of respondents in Bahrain who used common service center to avail one or more government services. This section would include purpose of visiting CSCs and satisfaction with various attributes of this channel and lastly user's suggestions and expectations. It may mention here that CSC as a channel was not launched during the wave 1 survey therefore did not form the part of the sample during wave 1. This section will detail out the findings pertaining to wave 2 and wave 3 only.

Section summary and next steps

Total of 200 Common Service Centers (CSC) users were contacted from database provided by EGA. Out of the total contacts made 74% males and 26% of female users agreed to participate in the survey. Data shows that about 90% of the respondents were above 26 years of age. Almost all respondents used the Arabic language which could imply that mostly locals used the CSCs. Thus it is noticed that across channels the users were males. Participation of females in handling e services was lower even during wave 3 which is consistent across all waves and across channels. The main reason for visiting CSC cited by majority of respondents was to obtain general information, besides smart card appointment and making other transactions including electricity bill payments.

According to the recent survey, all respondents perceived the CSC as necessary and important channel. There is significant improvement in the perception that CSC is a necessary channel from percentage moving from 47% to 73%. Overall 93% users are satisfied with the CSC services. There is no major change when compared with previous wave. Future intention to use the CSC was also remain the same as of previous wave. Meaning all respondent showed the intention that they will definitely/probably use the CSC in future. Overall across both waves, the CSC users expressed positive experience while transacting on the portal at CSC. However, two areas that need improvement related to adequate number of staff and enough seating arrangements at CSC.

At an overall level the feedback on the CSC agent was significantly positive. Some factors which have low percentages and need improvement includes; 'said his name', 'Used your name while dealing with you'. Very few respondents showed that they faced problems. The problems were related to both technical issues as well as physical issues; technical problems were related to slow process and network problems. While physical issues were related to availability of limited staff and less knowledgeable staff. About 30% respondents demanded more services to be included like more staff, more space, more chairs, more machines and more branches. About 8% demanded additional services (labour contact details, credit card payments, billing system and geographical information system) and trained and efficient staff. About 38% of CSC users expressed that web portal is the most relevant channel in terms of ease of usage and convenience. This is also noticeable that in terms of ease and convenience **toll free** ranking has dropped significantly while the ranking of **CSC** (common service center) has increased significantly. Thus in ways CSC seem to have taken over the toll free channel.

Almost all the respondents found it very easy to find the exact location of the common service center. About 89% respondents completed their transaction in one visit only which is slight increased from the previous wave. Respondents expressed their desire to locate CSC as in Malls / Shopping Center /market places. About 45% respondents also want CSC to be located near educational institutions and business centers. Some of the respondents expressed the need to have CSC in the residential areas as well since these areas are frequently visited by the residents and there will no extra effort required to plan a visit to CSCs.

4.1 Respondents' Profile

Total of 200 CSC users were contacted from database provided by EGA. Out of the total contacts made 74% males and 26% of female users agreed to participate in the survey. Data shows that about 90% of the respondents were above 26 years of age. Thus it is noticed that across channels the users were males. Participation of females in handling e services aspects was lower even during wave 3.

Exhibit 4.1 Distribution of Respondents across Age groups

CSC	Wave 2	Wave 3
Age group	**% of Total Sample**	
Base: All	*200*	*200*
15-18 Yrs	1%	3%
19-25 Yrs	12%	11%
26-35 Yrs	37%	27%
36-45 Yrs	31%	26%
46-55 Yrs	18%	28%
55 Yrs+	3%	6%

Exhibit 4.2 Gender of respondents

CSC	Wave 2	Wave 3
Gender	**% of Total Sample**	
Base: All	*200*	*200*
Male	76%	74%
Female	24%	26%

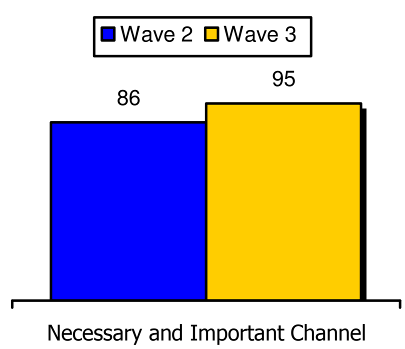
Base : All respondents (w3 200)

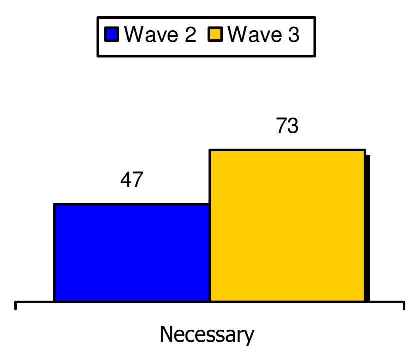
4.2 Importance of CSC

According to the recent survey, all respondents perceived the CSC as necessary and important channel. The percentage has also improved from 86% t0 95%, expressing that CSC is necessary and important channel. It also has shown a significant improvement on the perception that CSC is a necessary channel from 47% to 73%. Future intention to use the CSC was remain the same as of previous wave. Meaning all respondent showed the intention that they will definitely/probably use the CSC in future. It is encouraging to note that proportion of respondents recognizing CSCs as necessary channels has increased which indicates that people/customers appreciate handholding /guidance since most of them are not familiar with using computers and internet while some do not have enough information on e services. In addition to this some of the customers may not have access to computers and such an initiative is welcome by the users.

Exhibit 4.3 Importance of CSC

Top 2 Box (Necessary /Important)	Top Box (Necessary)

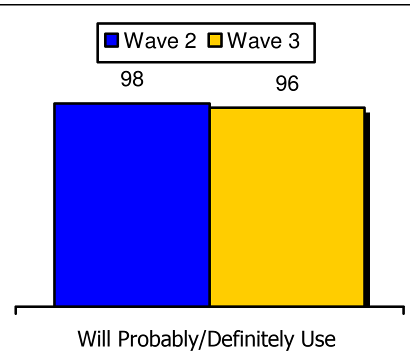


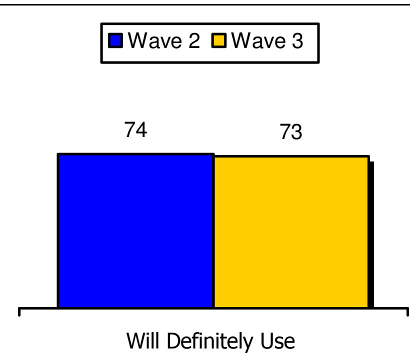


Base: All Respondents (w-200)

Exhibit 4.4 Future Intention to use CSC

Top 2 Box (Definitely/Might Use)	Top Box (Definitely Use)

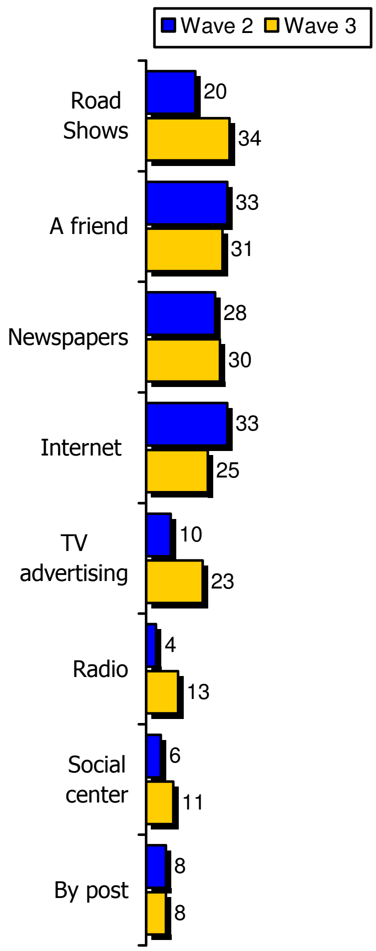




Base: All Respondents (w-200)

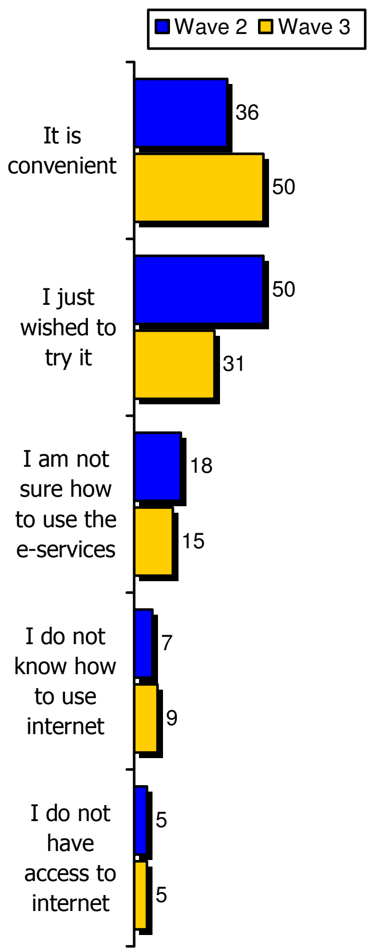
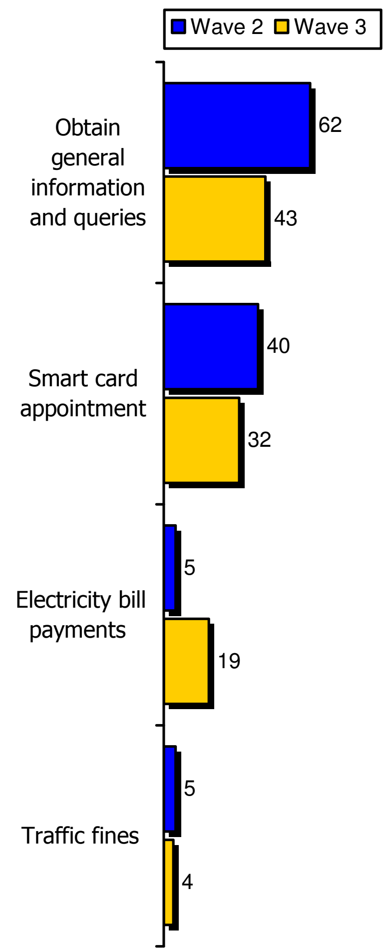
Data on awareness shows that internet, road billboards and friends constitute main source of awareness for CSC.

Exhibit 4.5 Source of awareness



4.3 Reasons and purpose of visit to the CSC

Many respondents visited CSC out of curiosity to try out a transaction and seek convenience. As mentioned earlier, many customers are not familiar with using e services and this evident from the data where one third of the users reported to visit a CSC mainly to try out using internet and familiarize themselves with e services. Obtaining general information, smart card appointment and making other transactions including electricity bill payments were the most common reasons for using the CSCs.

Exhibit 4.6 Reasons for Visiting CSC	*Exhibit 4.7 Purpose for Visiting CSC*
	

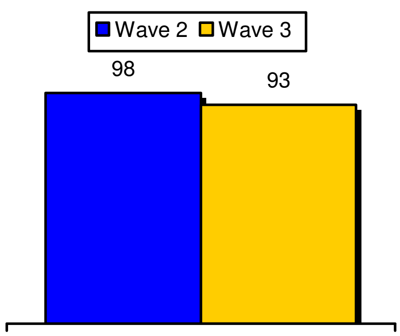
Base: All Respondents (w-200) (Multiple Responses)

4.4 Overall Satisfaction with CSC

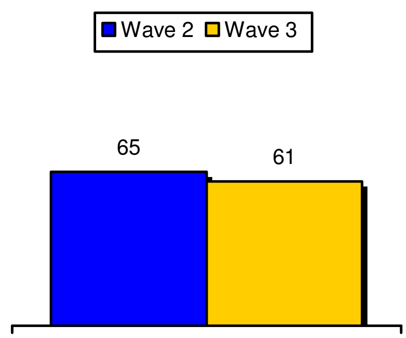
There is minor drop in the satisfaction level of the customers who used CSCs from wave 2 to wave 3. Overall 93% CSC users are satisfied with the CSC services.

Exhibit 4.9 Overall Satisfaction %

Top 2 Box (Extremely Satisfied/Satisfied)



Top Box (Extremely Satisfied)



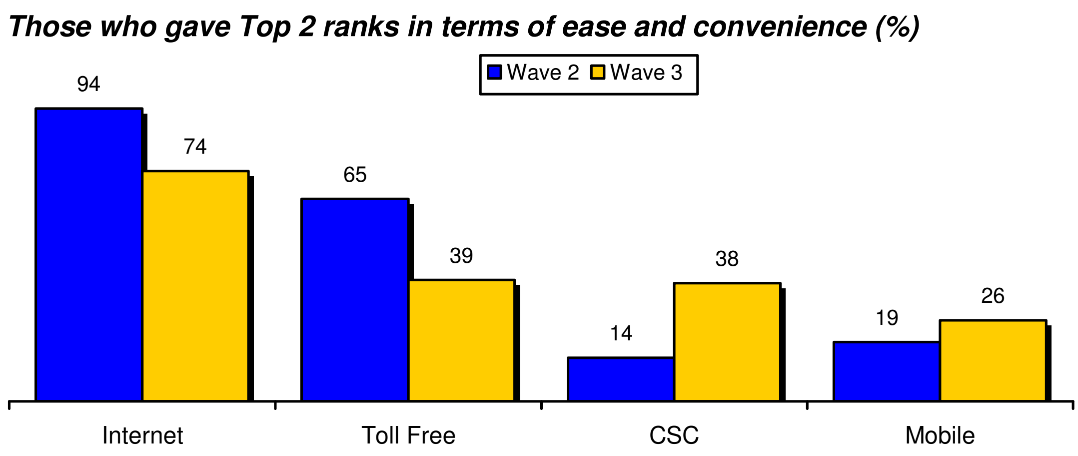
Base: All Respondents (w-200)

4.4.1 Satisfaction on 'Ease of usage and convenience'

About 38% of CSC users expressed that web portal is the relevant channel in terms of ease of usage and convenience. About half of CSC users mentioned that common service center is the relevant way in terms of ease of usage and convenience. There is encouraging improvement on this aspect when compared with wave 1 finding.

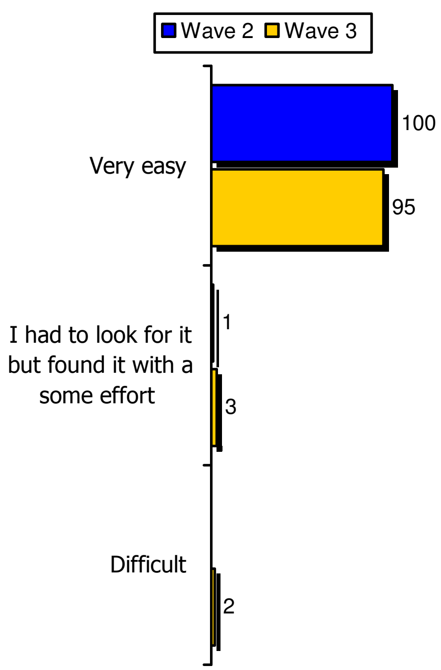
When asked about which channel is the most preferred in terms of ease and convenience? In the previous wave **web portal** and **toll free** were emerged as **1st** and **2nd** ranked channels respectively. In the current wave **web portal** has still taken the **1st** priority where as 2nd priority is almost similar for both **toll free** and **CSC**s. This is also noticeable that in terms of ease and convenience **toll free** ranking has dropped significantly while the ranking of **CSC** (common service center) has increased significantly.

Exhibit 4.11 Ranking of different channels. on ease of usage and convenience



According to the recent survey, majority (95%) of the CSC users reported finding the address as 'very easily'.

Exhibit 4.12 Ease of finding the CSC address



Base: All Respondents (200)

CSCs located at Budaiya Post Office, Muharraq Social Center and Sanad Post Office was known to more number of users when compared with other CSC locations. More than half of female users were aware of Muharraq Social Center.

Respondents expressed their desire to locate CSC as in Malls / Shopping Center /market places. About 45% respondents also want CSC to be located near educational institutions and business centers. Less than half of respondents also mentioned the residential areas as well since these areas are frequently visited by the residents and there will no extra effort required to plan a visit to CSCs. Almost all the respondents found it very easy to find the exact location of the common service center.

Exhibit 4.13 Current locations of CSC centers

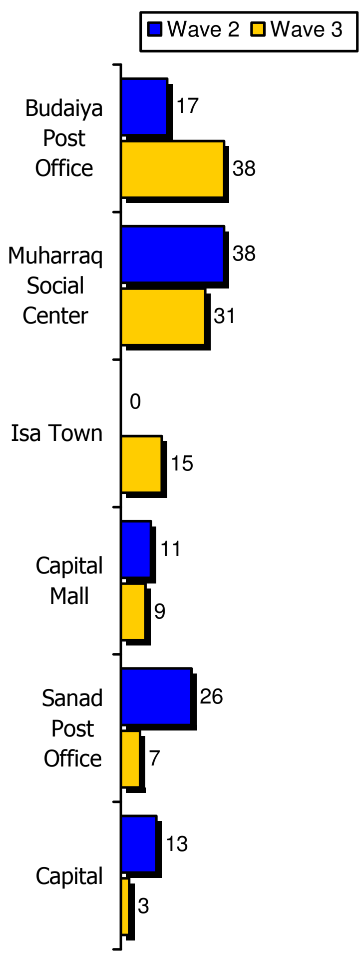
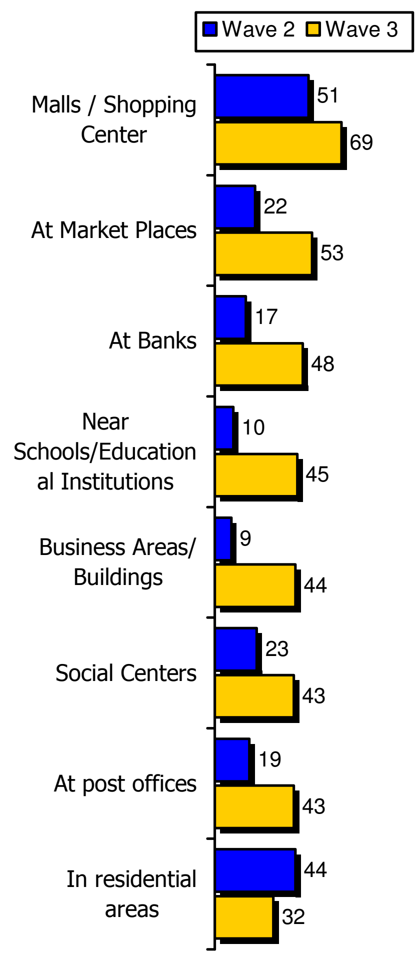


Exhibit 4.14 Desired locations of CSC centers

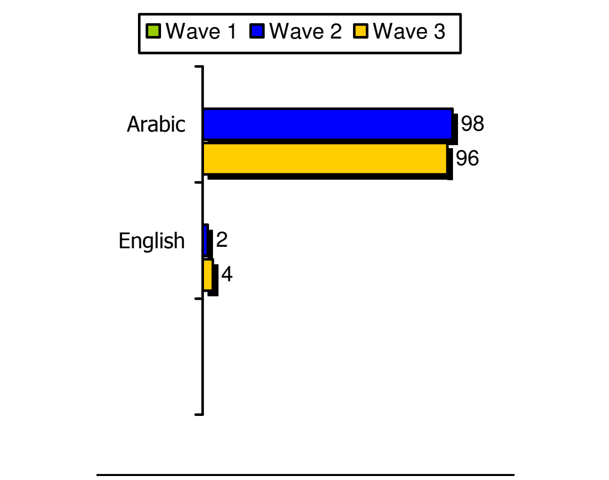


Base: All Respondents (w-200) (Multiple Responses)

4.4.2 Satisfaction on 'Choice and Clarity of Language'

Almost all respondents used the Arabic language which could imply that mostly locals used the CSCs.

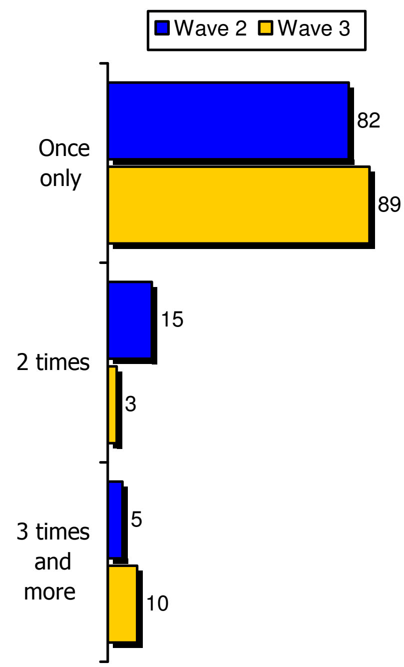
Exhibit 4.15 Language choice



Base: All Respondents (w-200)

4.4.3 Satisfaction on 'Time to Access the Service'

Exhibit 4.16 Number of visits to complete One Transact (Base: All Respondents)

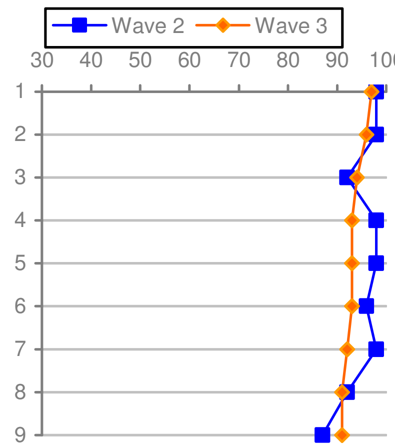


4.4.4 Satisfaction on 'Technical aspects'

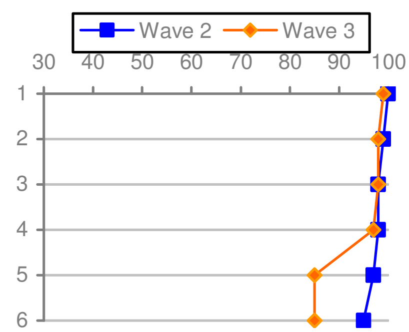
Overall across both waves, the CSC users expressed positive experience while transacting on the portal at CSC. However, the two areas need improvement related to adequate number of staff and enough seating arrangements at CSC.

Exhibit 4.17 Overall Feedback on transaction attributes

1 Transaction was secure
2 Do not mind doing more transactions at the center
3 Final output was as per expectation
4 Easy to communicate your need
5 Clear steps
6 You were able to complete all the transaction without having to visit any location
7 Effective follow-up
8 Transaction was simple
9 No problem in the service



1 Center was clean
2 Environment was pleasant
3 Computers were in good working condition
4 Felt welcomed in the center
5 Number of staff was adequate
6 Enough seating arrangement



Base: All Respondents (w-200)

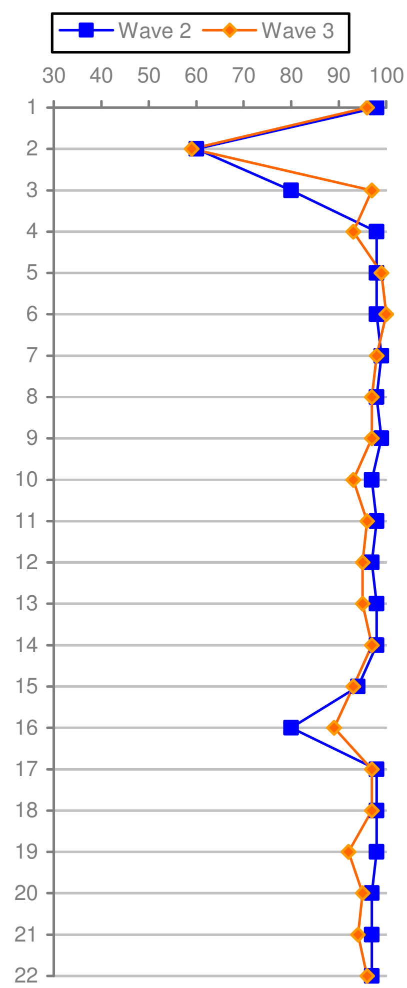
(Multiple Response)

4.4.5. Satisfaction on Agent at CSC

At an overall level the feedback on the CSC agent was significantly positive. Some factors have low percentages and need improvement includes; 'said his name', 'Used your name while dealing with you'.

Exhibit 4.18 Satisfaction with agent

1 Welcome and Greeted you
2 Said his name
3 Asked for your name
4 Had a cheerful voice
5 Spoke Clearly
6 Could speak the your preferred language properly
7 Was helpful
8 Listened to you carefully
9 Understood your request
10 Gave accurate information
11 Replied promptly
12 Had the information available with himself/herself
13 Directed you to the right following step
14 Was Confident
15 Asked for personal information for transaction purposes
16 Used your name while dealing with you
17 Gave convincing answers
18 Concentrated on the transaction
19 Did not ask you to use any other channel of e-services
20 Said thank you for using e-services
21 Asked if you need anything else
22 Had good knowledge regarding the e-services



Base: All Respondents (w-200)

4.5 Problems & Suggestions

Very few respondents showed that they faced problems. The problems were related to both technical issues as well as physical issues; technical problems were related to slow process and network problems. While physical issues were related to availability of limited staff and less knowledgeable staff. About 30% respondents demanded more services to be included like more staff, more space, more chairs, more machines and more branches. About 8% demanded additional services (labour contact details, credit card payments, billing system and geographical information system) and trained and efficient staff.

Exhibit 4.19 faced any problem

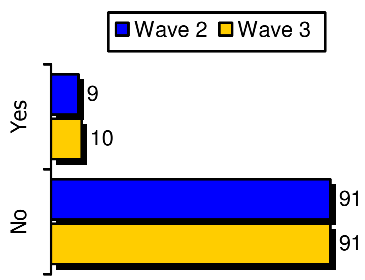


Exhibit 4.20 Common Services to be Included

	Wave 03
Base : All Respondents	*200*
	%
More resources required (staff, space, chairs, machines, branches)	30
Additional services required. Very few respondents suggested the desired services to be included such as more languages, labour contact details, credit card payments, billing system, and geographical information.	8
Trained and efficient staff	8
Improve the existing services including fast internet service	5
None	52

Base: All Respondents (w-200) (Multiple Responses)

To sum up, web portal continues to remain the most preferred channel however; newly introduced channels, mobile portal and CSCs are also being acknowledged and accepted. The main point to be highlighted here is that the first step is the most important and than it is internalized. Similarly once the customer's experiences the convenience of the services provided they tend to use it regularly and proactively get involved using and recommending them to others. CSC is an example where customers visited the centers out of curiosity and have found them to be convenient and useful. Focused marketing efforts should continue in spreading the message and encouraging people to use these services.